

Requirements Survey Human Resources			Requirements Response Rules:								
<p>The following functional, technical, workflow and reporting needs provide the minimum requirements of City of Madison. Please review the items carefully and respond in accordance with the requirements response rules provided. Any partial response will be deemed as an invalid response. MANDATORY: EVERY REQUIREMENT (Req#) MUST HAVE A RESPONSE TO BE CONSIDERED COMPLETE.</p>			<p>Column #1. Mandatory: Proposers are required to input one response per requirement using the drop down list provided. Response Types: F=Fully provided out of the box, or fully provided out of the box through basic configuration Mod= Provided through a technical modification of the software (i.e. a customization) TP = Provided through a proposed third party application or capability RT = Provided through a built in or proposed reporting tool NA = Not Available</p> <p>Column #2. Proposers are requested to itemize estimated costs for all modification requirements. Column #3. Proposers are requested to list the third party product name for all Third Party Product requirements. Column #4. Mandatory: Proposers are required to mark yes or no to whether the implementation costs of this functionality is included in their cost proposal. Column #5. Mandatory: Proposers are required to mark yes or no to whether the training costs of this functionality is included in their cost proposal. Column #6. If a subcontractor is implementing or providing training for this functionality, please indicate the name of the subcontracting firm responsible for this functionality. Column #7. Mandatory: Proposers are required to list the version number for all functionality proposed to the City.</p>								
Req#	PROCESS	Ranking	1.Response	2.Costs for Mod response	3.Third Party Application for TP response	4. Included in Implementation Costs		5. Included in training costs	6. Subcontractor	7. Version Number	Comments/Narrative
						Yes/No	Yes/No				
Staffing											
Critical & Unique Requirements											
M1	Ability for new hires and/or seasonal workers to complete online application of forms (Application, W2, Certifications) and paperwork electronically before first day/orientation (on boarding processes)	6									
M2	Ability for the City user to review applicant changes to online application data or see the application data as of a specific date/time.	6									
M3	Ability to send notification to HR improved when budgeted positions are established and when new positions are created.	6									
M4	Ability to mail merge and create communication letters based upon ERP data	6									
M5	Ability to track the gender, race (self-identified), and disability for applicants.	6									
Staffing Set Up											
1.00	Ability to integrate staffing with the following modules:										
2.00	Budgeting	5									
3.00	Human Resources	5									
4.00	Recruitment	5									
5.00	Project Accounting	5									
6.00	Grant Accounting	5									
7.00	Position Tracking	5									
8.00	Ability to set up and track new hire planning and forecasting (includes using info from WRS to forecast retirement eligibility).	5									
9.00	Ability to maintain an open, revolving list of requisitions.	5									
10.00	Ability to set up and track the following dates:										
11.00	Intent to hire date	5									
12.00	Posting Open date	5									
13.00	Posting Close date	5									
14.00	Posting Certification date (e.g. when supervisor receives list)	5									
15.00	Requisition Close date	5									
16.00	Offer date	4									
17.00	Hire date	5									
18.00	Ability to input and track an intent to hire by department for filling any positions.	5									
19.00	Ability to set up intent to hire templates, including: CERT										
20.00	Date of intent to hire	5									
21.00	Job Title	5									
22.00	Job Class Code	5									
23.00	PCN (position control number)	5									
24.00	FTE	5									
25.00	Scheduled Hours	5									
26.00	Status (e.g. permanent, full time, etc.)	5									
27.00	Cost Center	5									
28.00	Bargaining Unit	5									
29.00	Location	5									
30.00	Days of the week	5									
31.00	Position (Working) Title	5									
32.00	Supervisor	5									
33.00	Incumbent name	5									
34.00	Shift	5									

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35.00	Skills/Licenses/Certifications	5										
36.00	Credentials	5										
37.00	Special requirements (e.g. bilingual)	5										
38.00	Narrative field	5										
39.00	Other user defined	5										
40.00	Ability to flag and track an intent to hire as following:											
41.00	Internal Posting	5										
42.00	Multiple Requisition Types (e.g. Open Competitive, Departmental, City promotional, Seasonal/Intermittent)	5										
43.00	Reinstatement	5										
44.00	Interns	5										
45.00	Provisional	5										
46.00	Limited Term	5										
47.00	Grant Employees	5										
48.00	Trainees	5										
49.00	Other user defined	5										
50.00	Ability to identify what intent to hire fields are required and which are optional.	5										
51.00	Ability to define the intent to hire approvers by the department, division, services area, and other levels.	5										
52.00	Ability to route intent to hires based upon the classifications above.	5										
53.00	Ability to approve, deny or edit an intent to hire.	5										
54.00	Ability to default information from intent to hire to requisition.	5										
55.00	Ability to create a new Position Control Number (PCN) to associate with the intent to hire.	5										
56.00	Ability to attach an existing position control number (PCN) to an intent to hire.	5										
57.00	Ability to input a working title and official job title on a requisition.	5										
58.00	Ability to set up hire requisitions for each of the following:											
59.00	Open Competitive	5										
60.00	Departmental	5										
61.00	City promotional	5										
62.00	Seasonal/Intermittent	5										
63.00	Provisional	5										
64.00	Limited Term	5										
65.00	Grant Based	5										
66.00	Volunteer	5										
67.00	Emergency	5										
68.00	Intermittent	5										
69.00	Other	5										
70.00	Ability to input and track the following requisition information:											
71.00	Date of requisition initiation	5										
72.00	Date for posting	5										
73.00	Date for closing	5										
74.00	Job Title	5										
75.00	Job Class Code	5										
76.00	PCN (Position Control Number)	5										
77.00	Number of positions (by department, units, division/service area, job class)	5										
78.00	Number of vacancies (by department, units, division, job class)	5										
79.00	Recruitment type	5										
80.00	FTE	5										
81.00	Scheduled Hours	5										
82.00	Location	5										
83.00	Days of the week	5										
84.00	Position (Working) Title	5										
85.00	Supervisor	5										
86.00	Incumbent name	5										
87.00	Who the contact name is for the posting	5										
88.00	Shift	5										
89.00	Skills/Licenses/Certifications	5										
90.00	Credentials	5										
91.00	Special requirements (e.g. bilingual)	5										
92.00	Narrative field	5										
93.00	Drug Test Required	5										
94.00	Other user defined	5										

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95.00	Ability to input and track reason codes for requisitions, including:											
96.00	Additional Approved FTE	5										
97.00	For Reallocation	5										
98.00	Vacancy	5										
99.00	Ability to default information from class specifications to the requisition.	5										
100.00	Ability to default information such as the salary information from the job class code and bargaining unit to the requisition.	5										
101.00	Ability to default union contract information from the bargaining unit to the requisition.	5										
102.00	Ability to produce list of existing/current candidates before posting a new requisition.-Eligibility List	5										
103.00	Ability to identify existing candidates who would qualify for the position (e.g. match skills).	3										
104.00	Ability to update a requisition with a job class (e.g. job class of the position on the requisition is Social Worker but the position may be filled as a Senior Social Worker).	5										
105.00	Ability to fill position with one or more than one job class by position control number.	5										
106.00	Ability to input and track a requisition status based upon the following:											
107.00	Open	5										
108.00	Cancel	5										
109.00	Filled	5										
110.00	Closed	5										
111.00	On Hold	5										
112.00	Ability to define the requisition approvers by the department, division, services area, and other levels.	5										
113.00	Ability to identify what requisition fields are required and which are optional.	5										
114.00	Ability to approve hiring requisitions online.	5										
115.00	Ability to identify job level and specific unique requirements for certain job levels.	5										
116.00	Ability to have multiple user defined special requirements for the position (i.e. Spanish/English bilingual skills, 4 year degree required).	5										
117.00	Ability to edit an existing requisition.	5										
118.00	Ability to add to an existing requisition.	5										
119.00	Ability to reopen a closed/canceled requisition.	3										
120.00	Ability to reopen a filled requisition.	5										
121.00	Ability to create a job posting from one or many requisitions based upon job class.	5										
122.00	Ability to create a unique posting number for each posting.	5										
123.00	Ability to create a job posting for many job classes.	5										
124.00	Ability to create user defined templates for online applications and job postings (example: junior/senior appointments, short term appointments such as intermittent, law clerks, trainees.)	5										
125.00	Ability to define additional documents and requirements for a job position (e.g. a test, a supplemental questionnaire).	5										
126.00	Ability to maintain supplemental questionnaire templates.	5										
127.00	Ability to identify which information should be public in a posting and what information will stay internal.	5										
Recruiting and Selection												
128.00	Ability to make requisitions accessible for inquiry and viewing by hiring personnel.	5										
129.00	Ability to track applicants based upon information such as personal data, skill set, academic qualifications, training, supplemental questionnaire and test results.	5										
130.00	Ability to assign unique applicant IDs per applicant (other than social security).	5										
131.00	Ability to upload resumes and other application information.	5										
132.00	Ability to track recruitment efforts (e.g. web, mail, newspaper, and efforts).	5										
133.00	Ability to allow employment applications for open positions without a requisition from internal City employees. (Example: reassignment to same job class or transfer to a similar job class).	5										

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134.00	Ability to collect and track applicants for positions that do not require requisitions (e.g. intermittent applicants).	5										
135.00	Ability for the system to automatically select candidates with specific criteria to be interviewed (i.e. Veteran).	4										
136.00	Ability for the system to identify candidates who do not meet the required criteria for the positions (i.e. the position requires a Masters and the applicant only has a Bachelors).	3										
137.00	Ability to create multiple recruitment letter templates (e.g. interview letter).	5										
138.00	Ability for the system to have standard templates for multiple rejection letters based on department, division/service area, and/or job code.	5										
139.00	Ability for the system to generate a certified list of candidates who meet the requirements for the position.	5										
140.00	Ability to identify why a candidate was not selected (e.g. missing required qualifications).	5										
141.00	Ability to search for eligible applicants and employees based on job requirements, position requirements, candidate information, and other criteria.	3										
142.00	Ability to track the status (applied, reviewed, interviewed 1 st round, etc) of candidates who have applied for the job.	5										
143.00	Ability to generate conditional offer letters to selected candidates.	5										
144.00	Ability to monitor pass/fail of conditional offer requirements, such as drug or alcohol testing, background investigations and other.	5										
145.00	Ability to schedule testing requirements (e.g. drug or alcohol testing, background checks) with third party vendors.	5										
146.00	Ability to generate official hire letters to selected candidates.	5										
147.00	Ability to set up initial screening with predefined criteria (e.g. criminal conviction, drivers license, veterans preference, eligible to work in US, and other criteria).	5										
148.00	Ability to create an eligible list from a posting for each position/job class.	5										
149.00	Ability to create a certification list of individuals and identify who must be contacted for interview (e.g. Veterans, Disabled Veterans, and City Employees).	5										
150.00	Ability for employees to be hired without going through a full screening process, but still filling out an application. This process could happen before, during or after the requisition is filled.	5										
151.00	Ability for past employees to be rehired potentially without requiring the completion of the full screening process.	5										
152.00	Ability to create eligibility lists based upon an acquisition of an organization, function or activity.	5										
153.00	Ability to remove names from eligibility lists permanently or temporarily and track reason for removal.	5										
154.00	Ability to track applicants who have continually been interviewed but not hired.	5										
155.00	Ability to track past City employees or banned employees who cannot apply or be apart of an eligibility list.	5										
156.00	Ability to set up individuals as banned for application and the effective dates of the ban.	5										
157.00	Ability to override individuals on a banned list.	5										
158.00	Ability to notify HR when banned applicants apply.	5										
159.00	Ability to define requirements for candidates to fill vacancies in a new acquisition area.	5										
160.00	Ability to create eligibility lists with individuals with required certificates or licenses by the State and/or federal government.	5										
161.00	Ability to transfer to a new position without application if the maximum pay in each position is within a predetermined range, job class at similar level, and employee meets minimum qualifications.	5										
162.00	Ability for employees to change to open positions without application for the position (example: position in same job class).	5										
163.00	Ability to appoint employees hired under pre-identified job classes to permanent positions upon completion of the training program (e.g. being certified from the trainee list).	5										

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164.00	Ability to hire employees in pre-identified job classes without the completion of an application (i.e. the employee had the position before and would like to move back).	5										
165.00	Ability to have user defined recruitment plans for each requisition.	5										
166.00	Ability to create a list of candidates for interviews and additional screening.	5										
167.00	Ability to schedule and track interviews.	4										
168.00	Ability to have user defined interview and testing plans based on multiple factors including division/service area, department and/or job code.	5										
169.00	Ability to have user defined and/or template interview questions specific to each job code, position and/or other criteria.	5										
170.00	Ability to set up templates for email or mail notifications of non eligible candidates.	5										
171.00	Ability to set up templates for email or mail notifications for candidates for interviews.	5										
172.00	Ability to set up templates for email or mail notifications for conditional hires (e.g. drug testing, psychological evaluation).	5										
173.00	Ability to set up mandatory and optional interview requirements based upon job class and/or position (e.g. Top 300).	5										
174.00	Ability to set up and track multiple interview levels by job class and/or position.	5										
175.00	Ability to set up and track scoring methods for applicants.	5										
176.00	Ability to score applicants based upon defined criteria (e.g. veterans receive a certain score).	5										
177.00	Ability to set up scoring and weighting criteria by posting.	5										
178.00	Ability to provide statistical testing results based upon application answers, test results, and other information.	5										
179.00	Ability to move candidate to new hire and provide justification for hire.	5										
180.00	Ability to input and report on missed opportunities (e.g. when not selected the non traditional candidate for a job).	5										
181.00	Ability to inquire about all methods of communication to an applicant throughout the City.	5										
182.00	Ability to set up and notify hiring supervisors and staffing of outstanding requisitions (e.g. near closing date and not filled or upcoming closing date).	5										
183.00	Ability to set up and notify hiring supervisors and staffing of other dates.	5										
184.00	Ability to set up new hires processing workflow.	5										
Processing Employees												
185.00	Ability to set up and track multiple methods of hiring, including:											
186.00	Selection from a certified list	5										
187.00	Reinstatement	5										
188.00	Rehire	5										
189.00	Transfer to a different department	5										
190.00	Promotion	5										
191.00	Demotion	5										
192.00	Re-classification	5										
193.00	Career Promotion	5										
194.00	Transfer to a similar job class	5										
195.00	Trainees/cadets/interns	5										
196.00	Grant related	5										
197.00	Acting	5										
198.00	Other user defined	5										
199.00	Ability to set up expiration dates and notifications related to job status.	5										
200.00	Ability to track multiple reinstatement and restoration methods by bargaining unit, department, contract, etc. including:											
201.00	Reinstatement from leave of absence	5										
202.00	After resignation	5										
203.00	Restoration of sick leave unpaid balance	5										
204.00	Restoration of vacation/PTO/sick leave accrual rate hours	5										
205.00	Ability to send information to required departments for data transfer once hired (i.e. IT for computer account setup, HR benefits information, Payroll forms, and other information).	5										

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206.00	Ability to send information to required departments for data .transfer for employee changes (e.g. transfers within the City).	5										
207.00	Ability to assign and identify unique employee numbers.	5										
208.00	Ability to set up requirements for hiring supervisors to process for each new hire based upon job class, position or other user defined criteria.	5										
209.00	Ability to monitor the completion of required information and forms and escalate, if needed.	5										
210.00	Ability to monitor conditional hire requirements and pass/fail information, test scores, drug tests and other data.	5										
211.00	Ability to score examinations or parts of examinations by candidate.	5										
212.00	Ability to notify candidates of their examination scores.	5										
213.00	Ability to identify training requirements based on multiple factors including the position ID, job code, department, division/service area.	5										
214.00	Ability to assign rehires the previous employee number.	5										
215.00	Ability to assign and track equipment provided to new employees, employee changes or other criteria such as telecommuters (e.g. cell phone, Blackberry, and other equipment).	5										
216.00	Ability to flag return of equipment from employee changes (e.g. employee change requires cell phone return from previous position).	5										
217.00	Ability to define a checklist for benefit eligible and non benefit eligible new employees, including:											
218.00	City Employee Handbook	5										
219.00	Required Forms	5										
220.00	Optional Forms	5										
221.00	Other Forms	5										
222.00	Ability to define a checklist based upon job class.	5										
223.00	Ability to define a checklist based upon position level.	5										
224.00	Ability to define a checklist based upon department.	5										
225.00	Ability to define a checklist based upon other user defined criteria.	5										
226.00	Ability to define the frequency of items within a checklist (e.g. annual, and other frequencies).	5										
227.00	Ability to define orientation requirements for new hires based upon department, job class, and/or other factors.	5										
228.00	Ability to route completed new employee forms to appropriate departments, based upon multiple workflows.	5										
229.00	Ability to list missing documents by each new hire and/or dates.	5										
230.00	Ability to define different escalation factors based upon checklist item (e.g. a required item has a certain time frame vs. an optional item).	5										
231.00	Ability to override missing required items (e.g. such as provide a good faith letter).	5										
232.00	Ability to correct and make adjustments to forms based upon effective date and/or retroactively.	5										
233.00	Ability to set up requirements for hiring based upon hiring method (e.g. cadet/trainee needs additional education and/or experience prior to assignment to position).	5										
234.00	Ability to set up special posting and hiring rules for union related jobs and positions (example: lateral postings).	5										
Employee Rights												
235.00	Ability to provide specific City workers employment history to comply with union rights associated with layoffs and recall policies:											
236.00	Years of services or seniority	5										
237.00	Knowledge, Skills and Ability present at the time of hire	4										
238.00	Union Rights and bargaining unit	5										
239.00	Qualifications	5										
240.00	Department	5										
241.00	Geography	5										
242.00	Ability to track placement activities for employees on layoff.	5										
243.00	Ability to compare layoff employee personnel file to match for potential open positions based upon qualifications, skills, seniority, or other information.	4										
244.00	Ability to track how many employees are currently on layoff to how many have been recalled.	5										
Reports, Analysis and Inquiries												
245.00	Ability to track and report by an alternative placements list.	5										
246.00	Ability to track by organizational unit promotional list.	4										

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247.00	Ability to track Citywide promotional lists.	5										
248.00	Ability to report by open competitive list by class of employment.	5										
249.00	Ability to alert when the funding of a grant will end that is currently funding a position.	5										
250.00	Ability to track and report budget to actual information related to positions, job classes, and other criteria.	5										
251.00	Ability to track the numbers of employees at each level of the organization as defined by position ID.	5										
252.00	Ability to track the numbers of employees by management level as defined by position ID.	5										
253.00	Ability to report a list of vacant positions by position ID on multiple levels including department, division/service area and other criteria.	5										
254.00	Ability to report on filled and open positions.	5										
255.00	Ability to report on the turnover on multiple levels (i.e. position, job class, department, rep code and other criteria.).	5										
256.00	Ability to identify the potential recruitments by the position requirements based on the applicants, eligible candidates, and other criteria.	5										
257.00	Ability to report on EEO information.	5										
258.00	Ability to maintain and track applicant history by employee with jobs applied to, communications, jobs referred to, etc.	5										
259.00	Ability to track history of requisitions by employee or applicant.	5										
260.00	Ability to report on multiple employee statuses and expiration dates.	5										
261.00	Ability to track intermittent hours on a rolling 26 payroll period basis or other user defined period.	5										
262.00	Ability to provide reporting by hire types (e.g. new hires and rehires).	5										
263.00	Ability to report on the number of vacancies by position are at any specified time.	5										
264.00	Ability to report on average length of time a requisition has been submitted to hire.	5										
265.00	Ability to report on the following metrics:											
266.00	Number of openings	5										
267.00	Number of applicants for a job class	5										
268.00	Bargaining unit	5										
269.00	Number that meet min qualifications	5										
270.00	Were certified	5										
271.00	Were interviewed	5										
272.00	Received offers of hire	5										
273.00	Accepted offers of hire	5										

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Process Employee Changes												
Critical & Unique Requirements												
M1	Ability to support electronic requests for re-classification (either the current classification form must match the electronic fields or there must be a comments/notes section for detail)	6										
M2	Ability to support electronic Employee Requests to Fill and Employee Change Requests at the Agency level, with ability to forward to HR electronically	6										
M3	Ability to track and report on Employee Data – Including: Gender, Union Participation, Residency, Seniority, Direct Supervisor, Hour Type, Class Specifications, Fair Labor Status (Exempt/Non-Exempt), Hour Indicator, Employee Disciplinary History, Accidents, Violations, Disability, Race (Self-Identification)	6										
M4	Ability to integrate with external State/Federal systems to support Drivers License and Social Security Number validity check	6										
M5	Ability to attach photo image to Employee file	6										
M6	Ability to electronically manage creation and approval workflow for Agency Personnel Action Form	6										
M7	Ability to convert employee statuses – For example, a temporary/hourly employee to a permanent employee (or vice versa)	6										
Process Employee Changes Set Up												
1.00	Ability to set up an employee master file for each employee.	5										
2.00	Ability to input and track the following information for each employee:											
3.00	Last Name	5										
4.00	Middle Name	5										
5.00	First Name	5										
6.00	Suffix	5										
7.00	Prefix	5										
8.00	Other Name Maiden/ Alias	5										
9.00	Employee number	5										
10.00	Social Security number	5										
11.00	Birth date	5										
12.00	Multiple Addresses	5										
13.00	Multiple Telephone Numbers	5										
14.00	Multiple e-mail addresses	5										
15.00	Gender	5										
16.00	Multiple Emergency Contact	5										
17.00	Race/Ethnicity	5										
18.00	US Citizen	5										
19.00	Date of Birth	5										
20.00	Multiple User Defined Age Groups	5										
21.00	Visa status	5										
22.00	Marital Status	5										
23.00	Spousal and Dependent Names	5										
24.00	Spousal & Dependant Social Security Numbers	5										
25.00	Spousal & Dependant Dates of Birth	5										
26.00	Dependant school status	5										
27.00	Veteran	5										
28.00	Drivers License Expiration Date	5										

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						Yes/No	Yes/No	Yes/No	Yes/No			
29.00	Drivers License Restrictions	5										
30.00	Drivers License Class	5										
31.00	Vehicle Insurance Information	5										
32.00	Educational Degrees	5										
33.00	Certifications	5										
34.00	Credential Information	5										
35.00	Other Criteria	5										
36.00	Ability to maintain the following employment data, with effective dating for each employee:											
37.00	Original service/hire date	5										
38.00	Date in current position	5										
39.00	Date hired into Department	5										
40.00	Date hired into division	5										
41.00	Date assigned to supervisor	5										
42.00	Rehire date(s)	5										
43.00	Retirement date	5										
44.00	Terminated (Y/N)	5										
45.00	Termination date (multiple)	5										
46.00	Multiple Reasons for Termination	5										
47.00	Multiple Locations (i.e., possibly because of more than one position)	5										
48.00	Multiple Departments	5										
49.00	Multiple Divisions	5										
50.00	Multiple Cost Centers (including projects)	5										
51.00	Multiple Units	5										
52.00	Multiple Position (Working) Titles	5										
53.00	Multiple Position Numbers	5										
54.00	Multiple Job Titles	5										
55.00	Multiple Job Classes	5										
56.00	Multiple overtime codes (one per job class/department)	5										
57.00	Multiple Job Class Dates	5										
58.00	Multiple Appointment Codes	5										
59.00	Multiple Activity Codes	5										
60.00	Multiple Representation Codes (bargaining unit)	5										
61.00	Multiple Scheduled Hours	5										
62.00	Multiple Shifts	5										
63.00	Multiple Monthly Rates	5										
64.00	Multiple Hourly Rates	5										
65.00	Multiple Annual Rates	5										
66.00	Salary step	5										
67.00	Number of steps in range	5										
68.00	Multiple Funding Information	5										
69.00	Multiple FTEs	5										
70.00	Total of Scheduled Hours	5										
71.00	Multiple Promotion Dates and Information	5										
72.00	Multiple Probation Periods based on hours worked	5										
73.00	Multiple Transfer Dates	5										
74.00	Multiple Leave Programs	5										
75.00	Multiple Benefits Codes	5										
76.00	Background check (state, federal)	5										
77.00	Drivers License Validity Check	5										
78.00	Immigration Status (I9)	5										
79.00	Expiration date (for Visa)	5										
80.00	Visa number	5										
81.00	Student Status	5										
82.00	Telecommuter (Full Time or Part Time Telecommuter)	5										
83.00	Multiple Seniority Dates	5										
84.00	Multiple Mail Codes	5										
85.00	ID Badge Information	5										
86.00	Badge Number (e.g., Sheriff badge)	5										
87.00	W-4 and Indicators	5										
88.00	Other User Defined	5										
89.00	Ability to enter multiple start and end dates for all employee data.	5										
90.00	Ability to flag an employee's future application status as banned.	5										
91.00	Ability for employees to be appointed to a reallocated position.	5										
92.00	Ability to upload documents into the employee file.	5										

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93.00	Ability to input degrees, licenses, certifications verification, and credential information.	5										
94.00	Ability to input degrees, licenses, certifications, and credential expiration information.	5										
95.00	Ability to track medical and psychological requirements of employees.	5										
96.00	Ability to link employee data from the requisition to the employee file.	5										
97.00	Ability to link employee data from the intent to hire to the employee file.	5										
98.00	Ability to file and initiate employee action forms for employee personnel changes.	5										
99.00	Ability to set up online employee action forms unique to each status change, job change, employee change, and other criteria.	5										
100.00	Ability to fill a position with one or multiple job classes.	5										
101.00	Ability to effective date employee changes.	5										
102.00	Ability to set up workflow and approvals for employee action forms.	5										
103.00	Ability to have multiple workflows and approvals for employee actions forms based upon factors such as the action code, department, and other criteria.	5										
104.00	Ability to set up relationships between employee action form inputs and other changes (e.g. termination has multiple workflows based upon line of business, department, job code, position, and other criteria).	5										
105.00	Ability to set up and track rules and workflows for the following Employee Action Form actions:											
106.00	New Hire	5										
107.00	Transfer	5										
108.00	Promotion	5										
109.00	Rehire	5										
110.00	Retirement	5										
111.00	Termination	5										
112.00	Dismissal	5										
113.00	Employment Layoff	5										
114.00	Multiple Medical Layoff Dates	5										
115.00	Reinstatement	5										
116.00	Reallocation	5										
117.00	Demotion	5										
118.00	Suspension	5										
119.00	Status Change (e.g., Part Time to Full Time)	5										
120.00	Reassignment	5										
121.00	Acting Appointment	5										
122.00	Mobility Assignment	5										
123.00	Limited Duration	5										
124.00	Unclassified	5										
125.00	Trainee	5										
126.00	Grant	5										
127.00	Second Job	5										
128.00	Junior /Senior Promotion	5										
129.00	Other	5										
130.00	Multiple Leave Types	5										
131.00	Multiple Status Changes	5										
132.00	Multiple probation periods based on hours worked	5										
133.00	Ability to identify junior/senior job classes by department	5										
134.00	Ability to notify supervisor when employee becomes eligible for promotion when in a junior/senior job class.	5										
135.00	Ability to define if an Employee Action Form (EAF) is required for an action (e.g. reassignment to a different position may not require an EAF).	5										
136.00	Ability to define multiple EAF status changes.	5										
137.00	Ability to define workflows for non EAF actions.	5										
138.00	Ability to upload documents to support an EAF (e.g. additional hiring information or I9).	5										
139.00	Ability to track employee seniority date and/or hours by multiple unions and job classes.	5										

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140.00	Ability to record both an employee's permanent job class and temporary job class (example: acting appointment) and vice versa (employee in leave to unclassified) and whether or not the employee's department changed.	5										
141.00	Ability to record that the supervisor of an employee/ position is non-City (Example: Public Defender is a state employee and supervises City employees).	5										
142.00	Ability to record that an employee/positions does not have a permanent supervisor assigned (example: Retired Citizen Program participants, intermittent employees who fill in for staff absences across an entire department).	5										
143.00	Ability to identify if employee reports by positive time or by exception time.	5										
144.00	Ability to enter foreign addresses.	5										
145.00	Ability to record last name only when employee has one name.	5										
146.00	Ability to correct an employee number and associated records if employee number was miss-keyed with appropriate security.	5										
147.00	Ability to delete the second position for an employee where the second position was entered to the wrong employee record.	5										
148.00	Ability to identify assigned HR Representative for employee based on department and/or unit code.	5										
149.00	Ability to record a supervisors name in addition or in place of supervisor ID number.	5										
150.00	Ability to retrieve employee work phone number as provided and maintained in the City phone directory.	5										
151.00	Ability to have a similar name search feature.	5										
152.00	Ability to record and search on alias/alternate names.	5										
153.00	Ability to record and track when an employee may have multiple positions with same or different job classes and in the same or different department.	5										
154.00	Ability to record and track when employee's status may be the same or different across the different positions.	5										
155.00	Ability to accumulate job class hours by each position.	5										
156.00	Ability to track hour accumulators and balances for employees when multiple positions are combined.	5										
157.00	Ability to track probationary period and performance review schedule separately by position.	5										
158.00	Ability to record multiple positions for one employee even if all positions have the same job class (current system allows only 2 positions with the same job class).	5										
159.00	Ability to combine job class hours for the purpose of tracking review schedule if employee has two permanent positions in the same job class and department.	5										
160.00	Ability to apply overtime eligibility based on total employment (for example: 2 nonexempt positions will need to have hours worked from both positions considered to determine if over 40 hours in week).	5										
161.00	Ability to update a variety of hours accumulators with hours from each position.	5										
162.00	Ability for an employee to receive PTO accrual rate credit for prior City service and/or time worked for another employer, with security and approval.	5										
163.00	Ability to assign Fund/Center and project numbers to each position.	5										
164.00	Ability to manage FMLA usage history by employee.	5										
165.00	Ability to search by credentials for employees (i.e. in the case of a pandemic outbreak a department may need to search for employees with specific credentials to fill a position).	5										
166.00	Ability to track and report on why an employee leaves a position, including the following reasons:											
167.00	Promotion	5										
168.00	Interdepartmental Transfer	5										
169.00	Intradepartmental Transfer	5										
170.00	City Transfer	5										
171.00	Retirement	5										
172.00	Leave for Non-City Position	5										
173.00	Involuntary Reasons	5										

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174.00	Other User Defined Criteria	5									
175.00	Ability to track and report on probation extensions.	5									
176.00	Ability to track and report on reasons for probation extensions.	5									
177.00	Ability to track when an employee makes a request for reasonable accommodation and when/if it was provided.	5									
178.00	Ability to flag an employee who terminated under special retirement programs so as to monitor eligibility for rehire.	5									
179.00	Ability to identify that an employee who is being rehired is a former retiree.	5									
Reports, Analysis and Inquiries											
180.00	Ability to report on any data element by employee and/or job class.	5									
181.00	Ability to report and track by EAF action code.	5									
182.00	Ability to report and track status changes.	5									
183.00	Ability to track and report on employee demographic and personal data.	5									
184.00	Ability to report on organizational unit layoffs.	5									
185.00	Ability to report on Citywide layoffs.	5									
186.00	Ability to report changes to employee data historically.	5									
187.00	Ability to provide quarterly reports on performance review totals by rating received.	5									
188.00	Ability to report on institutional measures, including:										
189.00	Ethnic background by employee	5									
190.00	Percent of FTE's with past due performance evaluations	5									
191.00	Employee turnover (resign vs. retirement) by date range	5									
192.00	Ability to report on ACF hours by time and cost center for each employee.	5									
193.00	Ability to report on cost center transfers.	5									
194.00	Ability to provide comparison reports of personnel and FTE's with budgeted personnel FTE's.	5									
195.00	Ability to report on all wages for a specific employee by date range with capability to overlap years (i.e. for Social Security forms and SCAAP Report).	5									
196.00	Ability to report on average salary including benefits for any job class.	5									
197.00	Ability to report on each job class by department and the number of employees in each salary step.	5									
198.00	Ability to conduct trend analysis (ex: turnover, salary changes, etc).	5									
199.00	Ability to select employees for focus groups and surveys using a random number generator.	5									
200.00	Ability to track and report on multiple terminations (for each piece of employment, track term date, reason for terminating, report on hours information within each piece of employment and aggregate across).	5									
201.00	Ability to track and report on changes to appointment and activity codes.	5									
202.00	Ability to report on historical employee information for specified time periods (example: how many promotions during a specific time frame, performance rating information, salary changes for an employee, historical sick leave usage, funeral leave, etc).	5									
203.00	Ability to track and report on internal employee changes (for example: number/% of employees who changed departments, job classes, units).	5									
204.00	Ability to report turnover (%employees who terminated the City) by types of termination reasons, by department, bargaining unit, job class using the average number of employees in the time frame as the denominator.	5									
205.00	Ability to track and report on earnings hours and dollars by job class, department, bargaining unit (and other user defined) over specified time periods (example: how much overtime was worked for a job class from June through August).	5									
206.00	Ability to track and report on multiple termination reasons when an employee terminates a position.	5									
207.00	Ability to have employee complete an on-line exit questionnaire when terminating a position.	5									
208.00	Ability to analyze and report on exit questionnaire results.	5									

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209.00	Ability to record employee termination or leave status in addition to the employee's regular employment status (example: record "on leave" and still keep that the employee is permanent part time).	5								
210.00	Ability to track and report earnings hours and dollars by job class for employees who are in more than one job class.	5								
211.00	Ability to report or generate a notice on employees nearing NTE date or worked hours for different types of appointments (acting, limited duration, intermittent, temporary, etc).	5								
212.00	Ability to report descriptive statistics (mean, median, counts) on employee wage changes for a specific period of time by bargaining unit and job class.	5								
213.00	Ability to report on job classes by bargaining unit that have no active employees.	5								
214.00	Ability to group and report on occupational categories for job classes.	5								
215.00	Ability to report on employee count and average/median rate of pay by job class and bargaining unit.	5								
216.00	Ability to track and report on an employee performance review history with the City (current system is limited to current job class).	5								
217.00	Ability to track and report on vacation /PTO hours lost because balance is at the cap.	5								
218.00	Ability to generate organization charts by City, by department, by service area, by unit.	5								
219.00	Ability to generate organization charts based on a proposed structure.	5								
220.00	Ability to identify and alert employees who must file financial disclosures.	5								
221.00	Ability to report on number of employees by building location.	5								
222.00	Ability to produce an employee inquiry based on data from a specific date that shows a variety of employee specific information (snapshot of the employee's record logically grouped).	5								
223.00	Ability to report on vacancy percentages by department and pay period or other user defined period (e.g. Human Services).	5								
224.00	Ability to report on staff by division/service area and pay period or other user defined period.	5								
225.00	Ability to report on job class summary by pay period or other user defined period.	5								
226.00	Ability to report on job classes by division/service area by pay period or other user defined period.	5								

Requirements Survey Human Resources			Requirements Response Rules:								
<p>The following functional, technical, workflow and reporting needs provide the minimum requirements of City of Madison. Please review the items carefully and respond in accordance with the requirements response rules provided. Any partial response will be deemed as an invalid response. MANDATORY: EVERY REQUIREMENT (Req#) MUST HAVE A RESPONSE TO BE CONSIDERED COMPLETE.</p>			<p>Column #1. Mandatory: Proposers are required to input one response per requirement using the drop down list provided. Response Types: F=Fully provided out of the box, or fully provided out of the box through basic configuration Mod= Provided through a technical modification of the software (i.e. a customization) TP = Provided through a proposed third party application or capability RT = Provided through a built in or proposed reporting tool NA = Not Available</p> <p>Column #2. Proposers are requested to itemize estimated costs for all modification requirements. Column #3. Proposers are requested to list the third party product name for all Third Party Product requirements. Column #4. Mandatory: Proposers are required to mark yes or no to whether the implementation costs of this functionality is included in their cost proposal. Column #5. Mandatory: Proposers are required to mark yes or no to whether the training costs of this functionality is included in their cost proposal. Column #6. If a subcontractor is implementing or providing training for this functionality, please indicate the name of the subcontracting firm responsible for this functionality. Column #7. Mandatory: Proposers are required to list the version number for all functionality proposed to the City.</p>								
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						Yes/No	Yes/No				
Position Tracking											
Critical & Unique Requirements											
M1	Ability for Org Chart Creation capability (based upon employee/ supervisor relationships defined in data) - BOTH Online AND Printable Org Chart Review	6									
M2	Ability to create a System alert to identify when the grant funding for a position is lapsing due to a mid-fiscal year ending date.	6									
Position Tracking Set Up											
1.00	Ability to define and update class specifications, including:										
2.00	Class Title	5									
3.00	A description of duties and responsibilities of work	5									
4.00	Statement of qualifications (minimum requirements)	5									
5.00	Ability to set up and track position information to each position.	5									
6.00	Ability to define and update job position information and profiles.	5									
7.00	Ability to enter position start and end dates for each unique position ID.	5									
8.00	Ability to assign a class to a position.	5									
9.00	Ability to add new classes and change job class titles.	5									
10.00	Ability to track positions by user defined period by the following:										
11.00	Personnel Board authorized	5									
12.00	Filled	5									
13.00	Vacant	5									
14.00	Under filled	5									
15.00	Overfilled	5									
16.00	Limited term	5									
17.00	Job class	5									
18.00	Position	5									
19.00	FTE (e.g. .5 FTE)	5									
20.00	Employee	5									
21.00	Grant	5									
22.00	Temporary	5									
23.00	Council Approved	5									
24.00	Other User Defined	5									
25.00	Workers Compensation Code (for Workers Compensation Reinsurance Association report). Job Class-Risk Management	5									
26.00	Ability to compare differences between types of positions such as authorized to overfilled, authorized to vacant and other.	5									
27.00	Ability to track positions by user defined periods.	5									
28.00	Ability to track actual vs. budget costs differences by position and/or job classification.	5									
29.00	Ability to track board authorized positions by active, frozen, held and other criteria.	5									
30.00	Ability to track board authorized positions by exempt vs. non exempt.	5									
31.00	Ability to track actual hours worked vs. budgeted hours by summary and by employee.	5									
32.00	Ability to track positions by FTE and/or by dollar level (i.e. budget by FTE or budget by a maximum dollar level).	5									
33.00	Ability to track positions as contingent positions based on grant funding.	5									

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34.00	Ability to identify the grant funding a position.	5										
35.00	Ability to identify one grant to fund multiple positions.	5										
36.00	Ability to track grant: detail, name, grantor, and other grant information by position.	5										
37.00	Ability to identify one position as funded by multiple grants.	5										
38.00	Ability to track temporary positions (positions without benefits).	5										
39.00	Ability to track savings by vacant positions.	5										
40.00	Ability to track overtime by pay codes and special pay types by position and/or job classification.	5										
41.00	Ability to track board authorized permanent FTE's City wide and by department, division, line of business and unit by user defined periods.	5										
42.00	Ability to track actual permanent FTE's City wide and by department, division, unit, and line of business by user defined periods.	5										
43.00	Ability to track total hours worked (in FTEs) City wide and by department, division, unit, and line of business by user defined periods.	5										
44.00	Ability to track and compare prior year total hours worked (in FTEs) City wide and by department, division, unit, and line of business by user defined period.	5										
45.00	Ability to track total headcount City wide and by department, division, unit, line of business, and job class by user defined periods.	5										
46.00	Ability to track vacant FTE's City wide, and by department, division, unit and line of business by user defined periods.	5										
47.00	Ability to break down total hours worked (in FTE's) into Permanent FTE's, Temporary/Intermittent FTE's, and Overtime/Comp Time Earned FTE's City wide and by department, division, line of business and unit by user defined periods.	5										
48.00	Ability to track the impact on the budget (in FTE's) of reallocated job classes by department, division, unit, and line of business by user defined period.	5										
49.00	Ability to see the total number of FTE's approved by the City Council across department, division, line of business.	5										
50.00	Ability to drill down on the number of board authorized FTE's by multiple levels (i.e. department, division, line of business and unit).	5										
51.00	Ability to track the expiration date of a position if it is not permanent (i.e. if the position is temporarily funded or grant funded).	5										
52.00	Ability to set up funding requirements for a position.	5										
53.00	Ability to track the following position information:											
54.00	Department	5										
55.00	Unit	5										
56.00	Center	5										
57.00	Position Number	5										
58.00	Job Number	5										
59.00	Budgeted FTE	5										
60.00	Job Class Title	5										
61.00	Position Title	5										
62.00	On Call	5										
63.00	Grant	5										
64.00	Date Filled	5										
65.00	Date Vacated	5										
66.00	Current Employee	5										
67.00	Former Incumbent's	5										
68.00	Comments	5										
69.00	Acting	5										
70.00	Workers Compensation Code (for Workers Compensation Reinsurance Association report).	5										
71.00	Ability to assign multiple employee ID's to one position ID.	5										
72.00	Ability to assign one employee to multiple position ID's.	5										
73.00	Ability to split one position by two or more employees.	5										
74.00	Ability to determine set up charge back information for positions.	5										
75.00	Ability to track an employees temporary move from their full time position to a new position with different pay range or benefits eligibility.	5										
76.00	Ability to track vacancies and vacancy percentages by user defined period by division, department, and line of business.	5										

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77.00	Ability to track job class summaries by FTE's and headcount by period.	5										
78.00	Ability to define and update salary profiles.	5										
79.00	Ability to define and update salary range.	5										
80.00	Ability to define and update salary steps.	5										
81.00	Ability to define and input a new position, with effective dating and approvals.	5										
82.00	Ability to link a class to a position specification, according to attributes such as general duties, specific tasks, responsibilities, qualification requirements, relationships to other class specifications and other information.	5										
83.00	Ability to assign a unique Position Control Number.	5										
84.00	Ability to track a Position control number and an Employee ID separately (e.g., A position is assigned an ID and each employee has their own employee ID).	5										
85.00	Ability to identify a position as exempt or nonexempt.	5										
86.00	Ability to identify a position as classified.	5										
87.00	Ability to define multiple official titles and working titles to a position.	5										
88.00	Ability to identify multiple job classes as being eligible to fill one official position.	5										
89.00	Ability to fill a position with more than one job class.	5										
90.00	Ability to identify and track positions as vacant or filled.	5										
91.00	Ability to drill down from a vacant position to a requisition or intent to hire.	5										
92.00	Ability to drill down from a filled positions to the employee.	5										
93.00	Ability to update a requisition with a different job class (e.g. a requisition is a social worker but the position may be filled as a senior social worker).	5										
94.00	Ability to set up and track a formal title (City assigned) and multiple informal/working (assigned by the department or division) position titles for one position.	5										
95.00	Ability to tie multiple informal/working titles to one official title.	5										
96.00	Ability to enter predefined training, credentials, and certification requirements to each position ID.	5										
97.00	Ability to enter and assign user defined training, credentials and certification requirements to each position ID.	5										
98.00	Ability to assign user defined certification/testing requirements to each position ID.	5										
99.00	Ability to assign pre-defined credential requirements to each position ID.	5										
100.00	Ability to assign user defined credential requirements to each position ID.	5										
101.00	Ability to identify multiple funding sources for the position.	5										
102.00	Ability to identify user defined information at the position level (e.g., building security access profile, vehicle requirements, and other).	5										
103.00	Ability to identify background check requirements at the position level.	5										
104.00	Ability to identify drug test and other test requirements at the position level.	5										
105.00	Ability to track the funding for the position to the position posting.	5										
106.00	Ability to identify positions as the following:											
107.00	Permanently funded	5										
108.00	Grant Funded	5										
109.00	Temporarily Funded	5										
110.00	Ability to track grant start and end dates and tie the information into the position funded status.	5										
111.00	Ability to identify and track limited duration position start and end dates.	5										
112.00	Ability to identify the positions that are eligible for internal transfer.	5										
113.00	Ability to identify and track acting position start and end dates.	5										
114.00	Ability to define special posting and recruitment rules for union related vacancies and positions.	5										
115.00	Ability to define special posting and recruitment rules for lateral transfers.	5										
116.00	Ability to enter narrative text in a position description for tracking of duties.	5										

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						Yes/No	Yes/No			
117.00	Ability to set up chargeback's by position:									
118.00	Salary	5								
119.00	Benefits costs	5								
120.00	Fringe costs	5								
121.00	Associated costs (e.g., computer, phone, access card)	5								
122.00	Other costs	5								
123.00	Ability to track the physical location of a position by building, mail stop, cube and other locations.	4								
124.00	Ability to track position information, including:									
125.00	Budgeted	5								
126.00	Vacant	5								
127.00	Filled	5								
128.00	Personnel Board Approved	5								
129.00	Council Approved	5								
130.00	Ability to track the shift requirements (i.e. MF, Weekend, Shift 1, Shift 2), location requirements, and other criteria by position.	5								
131.00	Ability for employees to be appointed to a reallocated position.	5								
132.00	Ability to approve, edit or deny proposals requests for position reallocations.	5								
133.00	Ability to appeal a reallocation decision and make a request for reconsideration.	5								
	Reports, Analysis and Inquiry									
134.00	Ability to report on position control statistics, such as vacancy statistics.	5								
135.00	Ability to report by type of position, vacancy information, budget data and cost savings.	5								
136.00	Ability to report on budget to actuals by position or position types, and provide comparison data.	5								
137.00	Ability to report on position changes, and impacts to the City, departments, and divisions.	5								
138.00	Ability to report on grant funded positions nearing expiration.	5								
139.00	Ability to report on project related positions nearing project expiration.	5								

Requirements Survey Human Resources			Requirements Response Rules:								
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						Yes/No	Yes/No				
Organizational & Workforce Development											
Critical & Unique Requirements											
M1	Ability to provide online registration and tracking for training classes, which are linked to employee records	6									
M2	Ability to track CDL certification and effective dates (including ability to provide alerts based upon dates)	6									
Organizational & Workforce Development Set Up											
1.00	Ability to support SCORM and AICC compliance.	5									
2.00	Ability to integrate tracking of employee development to training based on assigned curriculum or training plan.	5									
3.00	Ability to track training hours.	5									
4.00	Ability to track training by:										
5.00	Skills	5									
6.00	Certifications	5									
7.00	Licenses	5									
8.00	CEU's (continuing education units), CPE (continuing professional education), CLE (continuing legal education), etc.	5									
9.00	Other Types	5									
10.00	Ability to automate access to career opportunities and matching of competency requirements and available opportunities.	5									
11.00	Ability to identify and flag training needs by employee.	5									
12.00	Ability to track comprehensive training information by employee.	5									
13.00	Ability to manage Individual Development Plans by employee.	5									
14.00	Ability to provide career development curriculum based on position, skill category, and other criteria.	5									
15.00	Ability to support the functions of training, employee development, skills tracking, testing, licenses, and certifications.	5									
16.00	Ability to input and track external training and internal training.	5									
17.00	Ability to setup and maintain courses/classes.	5									
18.00	Ability to setup multiple sessions within a class.	5									
19.00	Ability to define the following for each course:										
20.00	Course Code	5									
21.00	Class Name	5									
22.00	Narrative Course Description	5									
23.00	Prework Required	5									
24.00	Prerequisite and Equivalent Courses	5									
25.00	Start Date	5									
26.00	End Date	5									
27.00	Start Time	5									
28.00	Minimum Capacity	5									
29.00	Maximum Capacity	5									
30.00	Class Type	5									
31.00	Topic Area	5									
32.00	Competency/Development Area	5									
33.00	Method of Delivery	5									
34.00	Keywords	5									
35.00	CEU Type	5									
36.00	Number of CEU's awarded	5									
37.00	Certification/Licensing	5									
38.00	Hours in Class	5									

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						Yes/No	Yes/No	Yes/No	Yes/No			
39.00	College Credits	5										
40.00	Contact Person	5										
41.00	Contact Phone	5										
42.00	Sponsoring Department	5										
43.00	Sponsoring Division/Service Area	5										
44.00	Cancel Reason	5										
45.00	Co-Sponsor	5										
46.00	Course Originator	5										
47.00	Class Owner	5										
48.00	Reg. Reserved for Owner	5										
49.00	Auto Cancel Replace	5										
50.00	Enroll Close Date	5										
51.00	Cancel Close Date	5										
52.00	Wait List Close Date	5										
53.00	Self Registration Ok	5										
54.00	Self Wait Listing Ok	5										
55.00	Offer Online Only	5										
56.00	Course Conflict Type	5										
57.00	Free Cap Alloc Date	5										
58.00	Free Elig Check Date	5										
59.00	Time Conflict Type	5										
60.00	Capacity Check Type	5										
61.00	Prereq Check Type	5										
62.00	Charge per Seat	5										
63.00	Budget information	5										
64.00	Classroom	5										
65.00	Directions to Classroom	5										
66.00	Lead Instructor	5										
67.00	Secondary Instructor	5										
68.00	Targeted Audience Type	5										
69.00	Other User Defined	5										
70.00	Ability to mark type of training as required or optional by position or employee	5										
71.00	Ability to track training expiration dates by employee.	5										
72.00	Ability to automatically notify of upcoming required training.	5										
73.00	Ability to track applicant training for specific job classification.	5										
74.00	Ability to track applicant training qualifications for specific job classification.	5										
75.00	Ability to integrate training information to employee performance evaluations.	5										
76.00	Ability to provide on-line approval of training requests based on varying levels of security as defined by the City.	5										
77.00	Ability to provide email notifications to employees for the following:											
78.00	Enrolled	5										
79.00	Wait listed	5										
80.00	Class Reminders	5										
81.00	Cancellations	5										
82.00	Change in location	5										
83.00	Change in time	5										
84.00	Other User Defined	5										
85.00	Ability to copy supervisor on email notifications.	5										
86.00	Ability to set up and override capacity allocations by employee data and delete with security.	5										
87.00	Ability to provide training rosters.	5										
88.00	Ability to record and track the following employee registration statuses:											
89.00	Enrolled	5										
90.00	Wait listed	5										
91.00	Enrolled from wait list	5										
92.00	Student cancelled	5										
93.00	Class cancelled	5										
94.00	Approval needed	5										
95.00	Approval granted	5										
96.00	Mastered or not	5										
97.00	Pretest passed or not	5										
98.00	Prerequisite met	5										

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						Yes/No	Yes/No				
99.00	Other User Defined	5									
100.00	Ability to track employee skill sets.	5									
101.00	Ability to compare IDP goals with training taken.	5									
102.00	Ability to integrate Employee information with training information.	5									
103.00	Ability to produce a transcript by employee and provide employee self service to view transcript information.	5									
104.00	Ability to produce a training plan by employee and maintain in employee file.	5									
105.00	Ability to assign training to an employee based on criteria in the employee's person record (example: job class, supervisory status).	5									
106.00	Ability to set up various types of online training options, such as video, audio, web link, etc.	5									
107.00	Ability to track SCORM and AICC compliant training.	5									
108.00	Ability to track non SCORM or AICC compliant training.	5									
109.00	Ability to set up training tests prior to courses and provide online assessments including:										
110.00	Pre-test	5									
111.00	Post-test	5									
112.00	Multiple Choice	5									
113.00	True/false	5									
114.00	Fill in	5									
115.00	Matching Questions	5									
116.00	Store test questions in a questions bank	5									
117.00	Present questions randomly	5									
118.00	Provide feedback	5									
	Training Information										
119.00	Ability to track classes and courses needed for career/job progression planning and required prerequisites for employees.	5									
120.00	Ability to set up minimum qualifications to sign up for a training course/class (e.g. CPR 1 needed for CPR 2).	5									
121.00	Ability to override minimum qualifications, based upon user security and workflow.	5									
122.00	Ability to identify course equivalencies (e.g. Math 101 is equal to another course).	5									
123.00	Ability to change information assigned to a training class.	5									
124.00	Ability to maintain and select from a City defined pool of questions for tests and training.	5									
125.00	Ability to define training curriculums by division/service area, cost center number, supervisor and job class.	5									
126.00	Ability to assign training courses to a curriculum:										
127.00	By employee	5									
128.00	By groups of employees	5									
129.00	Ability to establish minimum number of courses to complete in curriculum.	5									
130.00	Ability to record due dates for completing curriculum minimum based on hire date, job class date, etc.	5									
131.00	Ability to assign employees to a training group by user defined criteria (e.g. job class).	5									
132.00	Ability to link a group of courses (e.g. curriculum) to a training group.	5									
133.00	Ability to enroll one employee or a group of employees to a training course.	5									
134.00	Ability for employees to sign up to courses via self-service.	5									
135.00	Ability to match Employee changes and trigger workflow for training information (e.g. an employee that changes job classes moves to a new training group and has new training requirements).	5									
136.00	Ability to automatically update skills, certifications, and licenses of attendees who have met the training requirements.	5									
137.00	Ability to notify the employee's supervisor of required training completion.	5									
138.00	Ability to record and report planned and actual information based on user defined criteria, for each training session.	5									
139.00	Ability to record multiple completion statuses of training (e.g., completed, partial completion, no show).	5									
140.00	Ability to allow employees to search for training needs and requirements.	5									

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141.00	Ability for employees to search or sort within training courses by the following:											
142.00	Type of Class (e.g. diversity classes)	5										
143.00	Sponsoring Department	5										
144.00	Course Code	5										
145.00	Course Name	5										
146.00	Method of Delivery	5										
147.00	Prerequisites	5										
148.00	CEU Type	5										
149.00	CEU's	5										
150.00	Available seats	5										
151.00	Dates	5										
152.00	Other User Defined	5										
153.00	Ability to assess gaps in training by department, employee group or other user defined criteria.	5										
154.00	Ability to track the budget and cost of each training course/class.	5										
155.00	Ability to produce the following templates by course:											
156.00	Class Roster	5										
157.00	Attendance Sheets	5										
158.00	Invoice participants	5										
159.00	Training certificates	5										
160.00	Training confirmations	5										
161.00	Pre-course requirements	5										
162.00	Other user defined templates	5										
Performance Management												
163.00	Ability to electronically route performance reviews for approval.	5										
164.00	Ability to have a variety of electronic performance evaluation templates.	5										
165.00	Ability to record a variety of performance ratings (e.g., alpha and numeric scales).	5										
166.00	Ability to have multiple raters.	5										
167.00	Ability to provide a rating based on weighting and scoring items in the review.	5										
168.00	Access to online resources such as content aids to assist supervisors in writing performance reviews.	5										
169.00	Ability to access employee's previous performance reviews with <i>property security</i> .	5										
170.00	Ability to assign performance review schedule using hours worked by job class and bargaining unit.	5										
171.00	Ability to assign performance review schedule using calendar date by job class and bargaining unit.	5										
172.00	Ability to override performance review schedule by employee.	5										
173.00	Ability to prepare and submit a non-scheduled performance review.	5										
174.00	Ability to track multiple review schedules at the same time (example: probation review and regular merit review).	5										
175.00	Ability to track Probation periods of differing lengths including initial, extended, department transfer, promotion, demotion.	5										
176.00	Ability to electronically notify supervisor that a review is due.	5										
177.00	Ability to electronically notify supervisor that a review is past due.	5										
178.00	Ability to provide supervisors with list of their employees and projected review date.	5										
179.00	Ability to integrate employee performance review documentation with grievance and employee development information.	5										
180.00	Ability to link salary information to performance review.	5										
181.00	Ability provide salary information for employees in acting appointments using permanent job class information for a performance review.	5										
182.00	Ability to electronically solicit feedback from other employees as part of the performance review.	5										
183.00	Ability to attach documents to the performance review.	5										
184.00	Ability to record and track Individual Development Plans (IDP).	5										
Reports, Analysis and Inquiries												
185.00	Ability to report on and project training costs.	5										
186.00	Ability to report on upcoming training required and due dates, by department.	5										
187.00	Ability to report on completed training by user defined period.	5										

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						Yes/No	Yes/No			
188.00	Ability to compare results of internal vs. external training.	5								
189.00	Ability to provide online performance review reports, including % completions and past due reviews.	5								
190.00	Ability to compare performance review ratings with salary recommendations.	5								
191.00	Ability to report on the number of employee with IDP's by department, division/service area, job class, bargaining unit.	5								

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Grievance										
Critical & Unique Requirements										
M1	Ability to provide system visibility to all Agencies (with appropriate security) of grievance status, disciplinary process/corrective actions, personnel action forms, performance notes, and employee paperwork.	6								
Grievances Set Up										
1.00	Ability to set up discipline and grievance tracking records.	5								
2.00	Ability to integrate with Human Resources, Payroll, Performance, Training and other modules.	5								
3.00	Ability to set up incidents codes/types (e.g. Policy Violation).	5								
4.00	Ability to set up descriptive or narrative text for incident descriptions.	5								
5.00	Ability to set up discipline codes (e.g. dismissal).	5								
6.00	Ability to set up the number of hours suspended.	5								
7.00	Ability to set up descriptive or narrative text for disciplinary descriptions.	5								
8.00	Ability to mark the date grievance or discipline was filed.	5								
9.00	Ability to mark the date grievance or discipline was received (different from the file date).	5								
10.00	Ability to set up multiple steps (e.g. Step One, Step Two) with required information at each step.	5								
11.00	Ability to set up panel tracking, mediation tracking and arbitration tracking.	5								
12.00	Ability to set up descriptive or narrative text for panel results, mediation results or arbitration results.	5								
13.00	Ability to set up and track action codes with multiple dates (date completed, effective date, end date) including:									
14.00	Oral Warning	5								
15.00	Written Warning	5								
16.00	Suspensions with pay	5								
17.00	Suspensions without pay	5								
18.00	Multiple reasons for Dismissals	5								
19.00	Other user defined types	5								
20.00	Ability to set up implementation plan types by action code.	5								
21.00	Ability to set up discipline and grievance tracking by status code (e.g. open, closed).	5								
22.00	Ability to set up grievance or discipline workflows based upon non union or union employment.	5								
23.00	Ability to set up multiple union workflows for the grievance or discipline process based upon bargaining unit.	5								
24.00	Ability to set up workflows based upon the type of grievance or discipline.	5								
25.00	Ability to set up workflows based upon employee characteristics (e.g. veteran or not).	5								
26.00	Ability to set up workflows based upon contract type (e.g. non contract employees).	5								
27.00	Ability to set up workflows based upon action code (e.g. suspension without pay routed to payroll).	5								
28.00	Ability to set up and link grievances to disciplines, as needed.	5								

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29.00	Ability to set up and track an appeals process for union and non union employees.	5								
30.00	Ability to alert supervisors and department heads of past due actions for grievances.	5								
Process										
31.00	Ability to transfer employee data into a discipline or grievance record, including the following:									
32.00	Employee Name	5								
33.00	Employee Number	5								
34.00	Bargaining Unit	5								
35.00	Department	5								
36.00	Division	5								
37.00	Job Class	5								
38.00	Union Steward	5								
39.00	Supervisor	5								
40.00	Location	5								
41.00	Other Employee Information	5								
42.00	Ability to enter and track the following information in an employee's file:									
43.00	Filing Date	5								
44.00	Contract Article Invoked	5								
45.00	Disciplinary Action	5								
46.00	Incident (that gave rise to discipline)	5								
47.00	Step 1 Data and Feedback	5								
48.00	Step 2 Data and Feedback	5								
49.00	Step 3 Data and Feedback	5								
50.00	Actual discipline	5								
51.00	Effective dates	5								
52.00	End dates	5								
53.00	Proposed Discipline	5								
54.00	Actual discipline	5								
55.00	Resolutions	5								
56.00	Appeal Information	5								
57.00	Meeting Dates	5								
58.00	Panel, Arbitration or Mediation Steps	5								
59.00	Ability to upload scanned documents or other documents to a grievance or disciplinary record per employee (e.g. letter, signed form).	5								
60.00	Ability to input and track narrative description by each step (Steps 1 through 3) and dates.	5								
61.00	Ability to track results of arbitration or mediation.	5								
62.00	Ability to track additional data resulting from a mediation, such as union response, and response type.	5								
63.00	Ability to track additional data if an arbitration occurs, including status of response, results, arbitrator's name, date, results, and other information.	5								
64.00	Ability to input and track settlement information.	5								
65.00	Ability to track types of settlements by employee, including:									
66.00	Reduction in discipline	5								
67.00	Sunset of discipline	5								
68.00	Withdrawal of discipline	5								
69.00	Back pay/retroactive pay	5								
70.00	Cash settlement	5								
71.00	Conditions to meet	5								
72.00	Other user defined types	5								
73.00	Ability to track types of settlements by employee and arbitration/mediation status, including:									
74.00	Active (awaiting arbitration date)	5								
75.00	Inactive and Open	5								
76.00	Arbitration scheduled	5								
77.00	Arbitrated/awaiting award	5								
78.00	Arbitrated and follow up required	5								
79.00	Settled	5								
80.00	Closed	5								
81.00	Ability to input and track how settlement information has been implemented.	5								

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82.00	Ability to set up multiple dates for responses and deadlines by City and/or union or other party, and send notifications.	5								
83.00	Ability to extend due dates for responses (e.g. City or unions requests and agrees upon an extension).	5								
84.00	Ability to workflow and update personnel file based upon settlement types.	5								
85.00	Ability to workflow information to appropriate departments based upon settlement type (e.g. payroll needs the information related to a status of back pay or retroactive pay).	5								
86.00	Ability to workflow and update personnel file when settlement types relate to total compensation (e.g. need to update accruals by employee).	5								
87.00	Ability to workflow and update personnel file when action relates to prohibition of future employment with the City.	5								
88.00	Ability to limit time entry codes if an employee is on suspension without pay.	5								
89.00	Ability to workflow and update personnel file for performance review, with grievance and/or discipline records by employee.	5								
90.00	Ability to flag and limit pay increases based upon disciplinary action results.	5								
Reports, Analysis and Inquiries										
91.00	Ability to inquire or generate ad hoc reports by employee, grievance or discipline type, status, multiple dates, and other user defined criteria.	5								
92.00	Ability to track the history of disciplines and grievances by employee.	5								
93.00	Ability to track and report on disciplines and grievances by department and/or division.	5								
94.00	Ability to track and report on disciplines and grievances by supervisor.	5								
95.00	Ability to report on number , type, outcome of grievances by bargaining unit	5								
96.00	Ability to track and report on disciplines and grievances by union/bargaining unit.	5								

Requirements Survey Human Resources			Requirements Response Rules:									
<p>The following functional, technical, workflow and reporting needs provide the minimum requirements of City of Madison. Please review the items carefully and respond in accordance with the requirements response rules provided. Any partial response will be deemed as an invalid response. MANDATORY: EVERY REQUIREMENT (Req#) MUST HAVE A RESPONSE TO BE CONSIDERED COMPLETE.</p>			<p>Column #1. Mandatory: Proposers are required to input one response per requirement using the drop down list provided. Response Types: F=Fully provided out of the box, or fully provided out of the box through basic configuration Mod= Provided through a technical modification of the software (i.e. a customization) TP = Provided through a proposed third party application or capability RT = Provided through a built in or proposed reporting tool NA = Not Available</p> <p>Column #2. Proposers are requested to itemize estimated costs for all modification requirements. Column #3. Proposers are requested to list the third party product name for all Third Party Product requirements. Column #4. Mandatory: Proposers are required to mark yes or no to whether the implementation costs of this functionality is included in their cost proposal. Column #5. Mandatory: Proposers are required to mark yes or no to whether the training costs of this functionality is included in their cost proposal. Column #6. If a subcontractor is implementing or providing training for this functionality, please indicate the name of the subcontracting firm responsible for this functionality. Column #7. Mandatory: Proposers are required to list the version number for all functionality proposed to the City.</p>									
Req#	PROCESS	Ranking	1.Response	2.Costs for Mod response	3.Third Party Application for TP response	4. Included in Implementation Costs		5. Included in training costs		6. Subcontractor	7. Version Number	Comments/Narrative
						Yes/No	Yes/No					
Self Service												
Critical & Unique Requirements												
M1	Ability to support Web-Based Self Service functionality for Employee information changes, with ability to integrate workflow for approval	6										
M2	Ability to support Web-Based Self Service functionality for Employee benefits elections (periodic enrollments) and for benefits changes (upon qualifying event)	6										
M3	Ability to provide web based Employee Self Service including: -Detailed tracking of hours by Leave type -Real time leave status	6										
M4	Ability to provide Manager Self Service workflow and access, which includes: -Detailed tracking of hours by Leave type -Real time leave status (of all assigned employees)	6										
Self Service Set Up												
1.00	Ability for self service to capture the following information with proper workflow approvals:											
2.00	Multiple Addresses	5										
3.00	Multiple Phone Numbers	5										
4.00	Marital	5										
5.00	Race	5										
6.00	Gender	5										
7.00	Multiple Emergency Contacts	5										
8.00	Multiple Name Changes	5										
9.00	Tax amount (w4)	5										
10.00	Multiple Dependents Information	5										
11.00	Check delivery address	5										
12.00	Transit card information	5										
13.00	Multiple E-mail Addresses	5										
14.00	Other user defined fields	5										
15.00	Ability for employees manage the following through employee self-service with workflow approvals:											
16.00	Review of pay, deductions, leave balances	5										
17.00	Request duplicate W-2	5										
18.00	What-if capability for determining effect on paycheck of changes to deduction, exemptions, and other changes.	5										
19.00	Maintain multiple bank information for direct deposit	5										
20.00	Change banking information	5										
21.00	Change personal information such as address, marital status, last name	5										
22.00	Change beneficiaries and information about beneficiaries (ex: contact information)	5										
23.00	Change voluntary deductions	5										
24.00	Review or enroll in benefits for open enrollment period	5										
25.00	Change benefits related to a life event	5										
26.00	Update W4 information such as tax filling status, number of exemptions, and withholding information	5										
27.00	View historical and current pay stub information: gross pay, taxes, other deductions, net pay, pay period, year-to-date totals, leave accruals and balances	5										

Req#	PROCESS	Ranking	1.Response	2.Costs for Mod response	3.Third Party Application for TP response	4. Included in Implementation Costs		5. Included in training costs		6. Subcontractor	7. Version Number	Comments/Narrative
						Yes/No	Yes/No					
28.00	Review vacation/PTO and sick day balances and submit leave requests	5										
29.00	Display remaining special leave without pay balance	5										
30.00	Report time	5										
31.00	Ability to support links to service providers and third party administrators through self service.	5										
32.00	Ability to provide browser based employee self service capability for the following benefits administration functions:											
33.00	Current benefits elections and costs	5										
34.00	Explanation of benefit options	5										
35.00	Enrollment for all benefits (including insurance, retirement (multiple plans) and other benefits) for both employees and dependents consistent with eligibility rules defined in Benefits Administration.	5										
36.00	Maintenance of dependent information including spouse, children and life partners	5										
37.00	Benefit package pricing worksheet for employee costs	5										
38.00	Benefit eligibility checking at time of enrollment	5										
39.00	Enrollment options (e.g., single vs. family coverage)	5										
40.00	Review of premiums paid and current premiums due	5										
41.00	Track current and historical beneficiary information	5										
42.00	Input and track student verification information	5										
43.00	Ability for HR and other departments to receive, view, approve and/or edit employee self-service transactions.	5										
44.00	Ability to provide supervisors access to view employee information.	5										
45.00	Ability to send email notification of current pay stub availability or personal data entry by someone other than employee with security.	5										
46.00	Ability for internal and external candidates for a job and view the status of the application.	5										
47.00	Ability for internal and external candidates and employees to schedule testing, sign up for training, obtain notification of training openings, and other options	5										
48.00	Ability for internal candidates to directly sign up to training courses via self service, with security, workflow and approvals.	5										
49.00	Ability for internal and external candidates to input their preferred method of communication (e.g. email, mail).	5										
50.00	Ability for internal and external candidates to input their interested jobs and positions and receive notifications when a job or position opens that meets their interests.	5										
51.00	Ability for employees to attach imaged required documentation to self service transactions.	5										
52.00	Ability to provide for processing the following benefits eligibility events:											
53.00	Establishment and maintenance of employee information	5										
54.00	Activation of coverage for employee, spouse, and non-spouse dependents	5										
55.00	Activation of coverage for survivors	5										
56.00	Maintenance of beneficiary information for multiple plans	5										
57.00	Extended coverage of dependents	5										
58.00	Medicare eligibility	5										
59.00	Initiation of COBRA processing when an individual's coverage is terminated due to a COBRA qualifying event	5										
60.00	Evidence of insurability	5										
61.00	Terminating/retiring employees	5										
62.00	Termination of coverage for employee, spouse, and non-spouse dependents	5										
63.00	Ability to send notification to employees based on benefit change types, enrollment information and other data.	5										
64.00	Ability for employees to access information about active and historical deductions.	5										
	Travel and Expenses											
65.00	Ability for City employees to initiate reimbursement for their travel expenses through direct entry via self service with workflow approvals.	5										
66.00	Ability for City employees to query on the status of their pending travel reimbursements via self service.	5										

Req#	PROCESS	Ranking	1.Response	2.Costs for Mod response	3.Third Party Application for TP response	4. Included in Implementation Costs		5. Included in training costs		6. Subcontractor	7. Version Number	Comments/Narrative
						Yes/No	Yes/No	Yes/No	Yes/No			
67.00	Ability to flag certain employee payments on a W-2.	5										
68.00	Ability to track employees who are eligible for mileage reimbursement.	5										
69.00	Ability to set up and track per diem rates.	5										
70.00	Ability to enter and submit claims by selected users on behalf of other employees, with security.	5										
71.00	Ability to set up and track the following travel information by request submission:											
72.00	Date range of travel	5										
73.00	In/out of County	5										
74.00	Travel reason	5										
75.00	Travel advance amount	5										
76.00	Departure date	5										
77.00	Return date	5										
78.00	Exception travel	5										
79.00	Estimated expenses	5										
80.00	Ability to set up and charge travel expenses by line item.	5										
81.00	Ability to charge travel expenses to the following:											
82.00	Department/division	5										
83.00	Grant	5										
84.00	Project	5										
85.00	Program	5										
86.00	Cost Center	5										
87.00	Account	5										
88.00	Other user defined	5										
89.00	Ability to identify travel line items that require receipts.	5										
90.00	Ability for travel reports to contain the following items:											
91.00	Travel claim identifier	5										
92.00	Employee identifier	5										
93.00	Travel line items	5										
94.00	Receipt required indicator	5										
95.00	Ability to allow employees to modify rejected travel claims.	5										
96.00	Ability to track submitted amounts and adjusted amounts separately.	5										
	Reports, Analysis and Inquiries											
97.00	Ability to report on all employee self service changes by employee, date range or department.	5										
98.00	Ability to report on outstanding documentation needed as a result of employee self service changes.	5										
99.00	Ability to report on historical employee benefits and payroll information.	5										
100.00	Ability to provide the following travel reimbursements inquiries/reports:											
101.00	Status of all travel claims by employee	5										
102.00	Paid travel claims by employee	5										
103.00	Unpaid travel claims by employee	5										
104.00	Travel claims awaiting action by approver	5										
105.00	Travel claims approved by approver	5										
106.00	Travel claims rejected by approver	5										
107.00	Travel claims awaiting payment by department	5										