| **King County Housing Authority** **R = Required****I = Important****N = Nice to have****E = Explore****Human Resource Information System Requirements** |
| --- |

| **Vendor – Software Vendor** | **Response** |
| --- | --- |
| 1. **Vendor and Software Name**
 |  |
| 1. **Vendor Contact:**
 |   |
| 1. Name and Title
 |   |
| 1. Address, Phone, Email
 |   |
| 1. **Vendor Information:**
 |   |
| 1. Year Founded, Public vs. Private
 |   |
| 1. Employee Count - Total
 |   |
| 1. Employee Count – Proposed Product
 |  |
| 1. Nearest Office to KCHA – Tukwila, WA
 |  |
| 1. **Customers on Proposed Application:**
 |   |
| 1. Total Customers
 |   |
| 1. Total Public Sector Customers
 |  |
| 1. Total Housing Authority Customers
 |  |
| 1. Total Public Sector Customers in Washington
 |  |
| 1. **Software Versions**
 |   |
| * 1. Proposed Version and Release Date
 |  |
| * 1. Current Version and Release Date
 |  |
| **Implementation Vendor (if different than above)** | **Response** |
| 1. **Vendor Name:**
 |  |
| 1. **Vendor Contact:**
 |   |
| 1. Name and Title
 |   |
| 1. Address, Phone, Email
 |   |
| 1. **Vendor Information:**
 |   |
| 1. Year Founded, Public vs. Private
 |   |
| 1. Employee Count - Total
 |   |
| 1. Nearest Office to KCHA – Tukwila, WA
 |  |
| 1. Software Applications Implemented
 |  |
| 1. **Customers on Proposed Application:**
 |   |
| 1. Total Customers
 |   |
| 1. Total Public Sector Customers
 |  |
| 1. Total Housing Authority Customers
 |  |
| 1. Total Public Sector Customers in Washington
 |   |
|  **Pricing** | **Response** |
| 1. **Software License:** For all modules to meet required functionality including SaaS or Hosting fees to support 550 W2s.
 |  |
| 1. **Implementation:** Estimate including process review, design, configuration, training, testing, integration, data conversion, reports, forms, etc.
 |   |
| 1. **Maintenance:** Indicate maintenance percent for years 1-10**.**
 |   |
| 1. **Recurring SaaS Costs:** Indicate annual SaaS fees for years 1-10.
 |  |
| 1. **Other:** Indicate any 3rd party software and associated costs required for requirements in scope.
 |   |
| 1. **Total One-Year Cost:** Software License, Implementation, Maintenance, SaaS Fees.
 |   |
| 1. **Total Ten-Year Cost:** Software License, Implementation, Maintenance, SaaS fees.
 |   |

| **Ranking** |   | **Response – Rating and Comment** |
| --- | --- | --- |
|  | **Modules**  |  |
| **R** | 1. Human Resources
 |  |
| **R** | 1. Time and Attendance
 |  |
| **R** | 1. Payroll
 |  |
| **R** | 1. Reporting
 |  |

|  |  |  |
| --- | --- | --- |
|  | **Technology** | **Response – Rating and Comment** |
| **R** | 1. Preference for SaaS or cloud solution; open to on-premises deployment. Indicate options and percent of customers using each.
 |  |
| **R** | 1. Indicate operating system and version requirements for proposed application (if required).
 |  |
| **R** | 1. Indicate database and version requirements for proposed application (if required).
 |  |
| **R** | 1. 100% web-based architecture. Indicate supported browsers.
 |  |
| **R** | 1. Role-level security to module, function, screen, and field. Define vendor response in the event of a data breach.
 |   |
| **R** | 1. Audit log of adds, modifications or deletions to user rights, roles, permissions.
 |  |
| **R** | 1. MS Active Directory or Azure Active Directory for Single Sign-On or SAML 2.0 to Active Directory.
 |  |
| **R** | **28**. Integration with Office 365. Indicate level of integration with Word and Excel. |  |
| **R** | 1. Email via Outlook 365.
 |  |
| **R** | 1. Two-factor authentication for mobile, SaaS and hosted environments.
 |  |
| **R** | 1. Data encryption at rest and in transit.
 |  |
| **R** | 1. List available integration technologies.
 |  |
|  | 1. Indicate integration strategy, experience, and proposed method for the following:
 |  |
| **R** | 1. Unit4 – General Ledger, Accounts Payable
 |  |
| **R** | 1. Vena – Budgeting
 |  |
| **R** | 1. NeoGov – Applicant Tracking
 |  |
| **I** | 1. OnBase –Document Management
 |  |
| **R** | 1. File extract to interface to external systems:
	1. Washington State – Department of Retirement Systems (DRS)
	2. State Pay1 - Public Employee Benefit – Medical, Dental, LTD, Life (PEBB)
	3. Navex – Sexual Harassment Training
	4. Empower – TPA Retirement
	5. Navia – TPA Flexible Spending
	6. DSHS – New Hire Reporting
	7. Washington State – Department of Labor and Industries
	8. Washington State – Employment Security Department – State Unemployment Insurance and Paid Family and Medical Leave
 |  |
| **R** | 1. Mobile device support. Indicate supported platforms.
 |  |
| **R** | 1. Describe mobile functionality to support remote leave requests, leave approvals, time entry, time entry approval, etc. Access to electronic pay stubs and tax forms (i.e. W-2, 1095-C).
 |  |
| **R** | 1. Describe web/portal functionality for employees and managers/supervisors/C suite/administrators
 |  |
|  | **General** | **Response – Rating and Comment** |
| **R** | 1. Configurable role-based dashboards that includes favorites, notifications, key reports, graphics, etc.
 |   |
| **R** | 1. Unlimited user-defined fields that can be used in queries and reports.
 |  |
| **I** | 1. Define alerts or notifications for specific events or transactions (i.e. S/L balance restoration, A/L credit).
 |  |
| **R** | 1. Rules-based workflow routing with prioritization, approvers, substitution approvers, escalation alerts, electronic signatures, date stamp and approval queue.
 |  |
| **I** | 1. Searchable and context sensitive help. Describe available help features.
 |  |
| **R** | 1. Describe available online training and support tools. Describe customer service support model and customer services accessibility.
 |  |
| **R** | 1. Audit log with date, time, user stamp, and before and after values.
 |  |
| **R** | 1. Add attachments to transactions (e.g. PDF, JPEG, TIF, Excel, Word, DWG, etc.).
 |  |
| **R** | 1. Effective dating of transactions throughout all modules.
 |   |
| **R** | 1. Enter multiple transactions that affect pay, positions, departments or deductions with same date, e.g. Merit, COLA, etc.
 |  |
| **R** | 1. Provide multiple environments including Production, Training, and Testing.
 |  |
| **I** | 1. Ability to process transactions in Human Resources during Payroll processing. Describe any limitations.
 |  |
| **R** | **Human Resources** | **Response – Rating and Comment** |
| **R** | 1. Position Control management including:
	1. Define positions and multiple FTE slots for each
	2. Maintain budgeted FTEs for vacancy reporting purposes
	3. Sync positions with Agresso, Vena, NeoGov
	4. General Ledger coding – 32 characters and 8 segments with up to 6 characters in a segment.
	5. L&I rate
	6. Position effective dates
	7. Position assignment effective dates
	8. Option to temporarily overlap positions
	9. Retain position history
	10. Track underfilled and overfilled positions (i.e. parked or vacant)
	11. Multiple employees to one position
	12. Multiple positions to one employee (reactive closed or parked position)
	13. Notifications – working out of class, probation period ending, etc.
	14. Master Classification list
 |  |
| **R** | 1. Manage onboarding process including:
	1. Import new hire from NeoGov
	2. New hire checklist or wizards
	3. Offer letter
	4. Email notification to departments
	5. Self-service for issuance and completion of new hire forms
	6. Schedule and conduct orientation
	7. Schedule and conduct mandatory training
	8. Schedule pre-employment activities
	9. Track issued items
 |  |
| **R** | 1. Employee master file data to include (and ability to capture multiple employment life cycles):
	1. Identification number
	2. Name – legal and preferred
	3. Department and division
	4. Position and salary history
	5. Direct deposit accounts
	6. Contact information
	7. Dependents
	8. Benefit elections – current and history
	9. MOU or Bargaining Unit
	10. Employment status: Regular and Long-Term Temp Full Time, Regular and Long-Term Temp Part Time, Short Term Temp, Introductory Period, Intern, Laundry, Seasonal, Retiree, etc.
	11. Union status: Represented, Non-Represented, including Local Union number or Temporary Union Hall to apply applicable union rules for overtime, etc.
	12. Dates: Hire, Promotion, Anniversary, Re-Hire, Seniority, Benefit Effective Date, Benefit Deduction Date, Termination, User Defined
	13. Diversity fields: age, education, ethnicity, gender, sexual orientation, race, mental/physical ability, etc.
	14. User-defined fields: official work location, timesheet number, etc.
	15. Social Security Number
	16. Work/Home and email address
	17. Emergency Contacts
	18. Driver license or job related license
 |  |
| **R** | 1. Rules-based eligibility for benefit elections with ability to override with permissions.
 |  |
| **R** | 1. Benefit premium, employee contribution (deduction), and employer contributions vary by represented and non-represented staff. In addition, Temporary Union benefits are based on hours and/or wages.
 |  |
| **R** | 1. Describe functionality to manage employees working out of class including:
	1. Position
	2. Effective dates
	3. Merit and COLA – during out of class assignment
	4. Merit and COLA – adjusted when return to original position
	5. Manager access to employee record
	6. Notification of out of class assignment
 |  |
| **I** | 1. Generate report to support the reconciliation of deductions to provider billings.
 |  |
| **R** | 1. Manager self-service portal including:
	1. Leave requests and balances and usage
	2. Initiate pay adjustments
	3. Manage Performance reviews
	4. View Performance Appraisals due
	5. View employee data (i.e. pay, positions, hire date)
	6. Notifications
 |  |
| **R** | 1. Employee self-service portal including:
	1. Paycheck modeling
	2. Update direct deposit
	3. Leave requests and balances,
	4. View pay advice, W2, W-4, 1095-C. Also paycheck copies should have signature block redacted.
	5. Update contact information and dependents
	6. Upload and attach documents
	7. View compensation – current and history
	8. View benefit elections – current and history
	9. View Employee Handbook
	10. Mobile device access
 |  |
| **R** | 1. Workflow approval routing of all self-service changes before change is applied to employee record.
 |  |
| **R** | 1. Open enrollment processing including:
	1. Display current elections
	2. Option to confirm the same for new year
	3. Option to select new
	4. Attach required supporting documents
	5. Report open enrollment changes to PEBB
 |  |
| **R** | 1. Modifications to employee record in Human Resource flow through to Payroll and Time and Attendance modules.
 |  |
| **R** | 1. Salary and compensation management to include:
	1. Effective dated salary tables
	2. Grades and Steps
	3. Salary bands
	4. Salary history
	5. Retro or lump sum payments
	6. Reason codes
 |  |
| **R** | 1. Management, tracking, and reporting of intermittent FMLA on rolling calendar year including maximum allowed. Also tracking of WA State PFML once received by HR.
 |   |
| **R** | 1. Performance review management including:
	1. Annual and probationary
	2. Due dates
	3. Notifications – 30 days before, past due, etc.
	4. Standard form
	5. Results/performance ratings
	6. Workflow approval routing
	7. Input from multiple Supervisors
	8. Merit based on rating
	9. Tracking of goals and completion
 |  |
| **R** | 1. Track training, certifications, licenses, etc. with expiration dates.
 |  |
| **R** | 1. Manage tuition reimbursement program including application, eligibility, approvals, reimbursements, workflow, etc. Also tracking of annual limit of annual tuition reimbursement limit per employee for income tax reporting purposes.
 |  |
| **R** | 1. Track requirements for training, licenses, and certifications for in-house and outsourced training.
 |  |
| **N** | 1. Describe functionality to support Advanced Learning Management including:
	1. Curriculum development
	2. Personalized training plans
	3. Online Class registration
	4. Wait list queue management
	5. Group-based learning
	6. SCORM-compliant content
	7. Course completion
	8. Testing and grading
 |  |
| **I** | 1. Interface with online learning resources – record completed training, e.g. LinkedIn Learning, U2ME, etc. Indicate partners.
 |  |
| **R** | 1. Succession Planning functionality and tools; describe available functionality to support the development of KCHA staff.
 |  |
| **R** | 1. Separation checklist or wizard including:
	1. Notification to departments. Include warning and reminder to submit final timesheet.
	2. Cobra letter
	3. Exit interview
	4. Retirement package
	5. Pay-outs
	6. Collect KCHA property
	7. Address confirmation
 |  |
| **R** | 1. Initiate effective-dated personnel changes with workflow approval routing by type. Update to employee master file when all approvals complete.
 |  |
| **I** | 1. Cobra Administration including notifications, tracking, billings, etc.
 |  |
| **R** | 1. Regulatory tracking and reporting including FLSA, ADA, EEOC, BLS, etc.
 |  |
| **R** | 1. Affirmative Action Plan management and reporting.
 |  |
| **R** | 1. ACA tracking and reporting including:
	1. Look back reports for actual hours worked
	2. Generation and mailing/filing of 1094 and 1095-C reports (currently outsourced)
 |  |
| **I** | 1. Generate Employee Compensation Statements.
 |  |
| **I** | 1. Org Charting functionality with dynamic updates.
 |  |
| **N** | 1. Notification to reinstate sick leave balances for employees that return within 12 months of separation.
 |  |
| **R** | 1. Generate turnover and termination report and post to dashboard.
 |  |
| **R** | **Time and Attendance** | **Response – Rating and Comment** |
| **R** | 1. Support multiple flex work schedules and default in for time entry, e.g. 9/80, 4/10’s, 5/8’s, etc. Ability to allow employees to revert weekly schedule from 4/10s to 5/8s on workweeks that include paid holiday(s).
 |  |
| **R** | 1. Exception based time entry or all-time based entry defined by employee group or department. Include built in warning for Exempt employees who enters leave in partial day increment.
 |  |
| **R** | 1. System calculation of overtime based on bargaining union and position, e.g. over 40 hours of regular pay within a work week for non-represented and over 8 hours per day for represented. Ability to override calculation of overtime if there is an adjustment entered for a previous pay period correction.
 |  |
| **R** | 1. Rules-based Comp Time including:
	1. Union employees bank to 40-hour max per year and must be used within the year, paid overtime for hours over maximum
	2. Non-exempt staff have no maximum
 |  |
| **R** | 1. Leave management including:
	1. Multiple types and eligibility rules including ability to automatically apply accrual and expiration of use-it-or-lose-it leave types, and transfer leave balances from one type to another based on annual limits
	2. Rules based for accruals, usage, balances, maximums, carry over, overrides, PERS-able Leave, etc. Ability to override standard leave accrual based on special contract with certain employees, i.e. employees who have negotiated a higher annual leave accrual.
	3. Leave requests with approval routing
	4. Project leave balances to a future date
	5. Display approved and unapproved leave
	6. Track donated leave
	7. Return unused leave donations
	8. Populate time entry with approved leave
 |  |
| **R** | 1. Electronic timekeeping for all employees with access via self-service, kiosk, or mobile device.
 |  |
| **R** | 1. Workflow routing of timesheets for approval including one or multiple approvers and temporary approvers.
 |  |
| **R** | 1. Display leave bank balances at time entry screen; issue warning or stop if time entered exceeds leave banks.
 |  |
| **I** | 1. Drop down list of eligible charge and activity codes specific to employee, pay class, and department.
 |  |
| **R** | 1. Dashboard view of timesheet status and approval queue. Defined due date for timesheets with reminder emails and escalation steps.
 |  |
| **R** | 1. Allow employees to modify time entry and re-route for approval within defined time period and clearly indicate it is a corrected timesheet from a previous pay period, preferably at the top of the timesheet form
 |  |
| **R** | **Payroll** | **Response – Rating and Comment** |
| **R** | 1. Bi-weekly and monthly pay cycles with off-cycle pay runs as required.
 |  |
| **R** | 1. Define unlimited earnings and deduction codes including:
	1. Rules-based
	2. Formulas or fixed amounts
	3. Number of and specific pay periods
	4. Stop deduction once maximum reached
	5. Assign deduction priority
	6. Valid codes for position or group
	7. Effective dated
	8. Special pay
	9. Garnishments
 |  |
| **I** | 1. Track benefit deductions in arrears when pay does not cover deductions.
 |  |
| **R** | 1. Default values by employee for earnings, hours, General Ledger account, and charge codes with ability to override at time entry.
 |   |
| **R** | 1. Apply multiple pay codes per employee per pay period.
 |  |
| **R** | 1. Initiate Personnel Action for all pay related modifications, route for approval and apply to employee record in system.
 |  |
| **R** | 1. Enter change that affects all employees or group of employees with approval routing, e.g. COLA at fixed percent.
 |  |
| **R** | 1. Process mid-period and retroactive pay changes and associated impacts on contributions, deductions, FLSA calculations, and reporting to benefit providers. Note: retro pay adjustments can be up to a 2-year time period.
 |  |
| **R** | 1. Generate report that identifies all changes made within a specified date range, pay period, etc.
 |  |
| **R** | 1. Exception reporting to review for double pay, no pay, changes since last payroll, net pay less than benefit deductions and garnishments, etc.
 |  |
| **R** | 1. Generate a gross-to-net report to proof all payroll calculations before checks/pay advices are produced.
 |  |
| **R** | 1. Generate KCHA defined pay advice and paychecks and automatically make available on employee self-service (no manual intervention).
 |  |
| **R** | 1. Generate pre-note for new or changes to direct deposit accounts.
 |  |
| **R** | 1. Generate positive pay report.
 |   |
| **R** | 1. Generate vendor and garnishment payments and interface to Accounts Payable.
 |   |
| **R** | 1. Describe strategy to stay current with mandated Federal and State reporting.
 |  |
| **R** | 1. Updates to Federal Tax tables maintained by vendor as version updates.
 |  |
| **R** | 1. Produce data for multi-state and Federal monthly, quarterly, and yearly tax forms and filings.
 |   |
| **R** | 1. Electronic reporting and filing for Social Security, IRS, State and Workers Comp.
 |  |
| **R** | 1. Generate W2s and automatically make available via employee self-service portal, and mobile device access (no manual intervention).
 |  |
| **I** | 1. Calculate year-end accruals of salaries, benefits and accrued compensation (e.g. vacation).
 |  |
| **R** | **Reporting** |  |
| **R** | 1. Library of standard reports to support reporting and analytics.
 |  |
| **R** | 1. End user-level query and reporting tools with filters, date ranges, or point in time criteria.
 |  |
| **R** | 1. Power user-level reporting tools e.g. Microsoft SQL Reporting Services, Power BI, Crystal, etc.
 |  |
| **R** | 1. User-level security flows to queries and reports.
 |  |
| **R** | 1. Drill down to source transactions and attachments from queries or reports following user-security.
 |  |
| **I** | 1. Schedule generation of reports and distribute via e-mail, to a shared folder, dashboard, or portal.
 |   |
| **R** | 1. Generate reports in multiple formats, e.g. HTML, PDF, Excel, Word, etc.
 |   |
| **I** | 1. Save report and query templates and make them shareable with other users or kept private.
 |  |