King County Housing Authority

Request for Proposal

Human Resource Information System (HRIS) Software and Implementation Services

RFP Release Date: July 22, 2022

RFP Response Due Date: September 1, 2022

King County Housing Authority (KCHA)

ADVERTISEMENT FOR PROPOSAL

HRIS Software and Implementation Services

King County Housing Authority (KCHA) is soliciting Proposals from qualified software vendors (Vendors) to provide Human Resource Information System (HRIS) solutions and implementation services. The functional areas in scope include Human Resources, Learning Management, Time and Attendance, and Payroll. A detailed description of the specific modules and services required are contained in this RFP. KCHA is open to reviewing proposals from Vendors that provide all modules in scope within a single solution. Vendors that also provide only a Learning Management solution may also respond to this proposal.

The RFP document packet can be obtained by emailing Therese Ross at thereser@kcha.org or from KCHA's website. Questions regarding this RFP must be submitted in writing according to the instructions and timeline included in this RFP.

Any addenda or Vendor questions and their corresponding answers will be posted to KCHA's web site. Vendors should monitor the web site frequently to look for Addendums. It is the responsibility of all Vendors to stay current on all bid documents.

Emailed proposal responses must be received by KCHA by September 1, 2022. Late responses will not be accepted. KCHA is not responsible for delays in delivery. Responses must be submitted per the instructions provided in the RFP.

Any clarifications or revisions regarding this RFP process will be addressed and issued according to the schedule provided in the RFP. KCHA reserves the right to cancel this request or reject any and all responses submitted, or to waive any minor irregularities if it is in the best interest of KCHA to do so.

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SECTION 1 - INVITATION FOR PROPOSALS

KCHA is seeking to obtain proposals from experienced and qualified software Vendors (Vendors) for the acquisition and implementation of a Human Resource Information System (HRIS) that satisfies all of KCHA's functional and technical requirements. A detailed description of the products and services required are contained in this RFP. KCHA is open to reviewing proposals from Vendors that provide all modules in scope within a single solution; KCHA is also open to considering vendors that offer only a Learning Management System.

It is the Vendor's responsibility to submit proposals by the designated date and time within this RFP. No late proposals will be accepted. KCHA accepts no responsibility for lost or misdirected submittals. KCHA is not liable for any costs incurred by the Vendor before issuance of a contract. All costs incurred in responding to this Request for Proposal are the responsibility of the Vendor.

Proposals submitted will not be considered public information until after the award of the contract to the successful Vendor. All materials and information submitted in response to this RFP become the property of KCHA. Submission of a proposal shall constitute acknowledgment and acceptance of all terms and conditions contained in this RFP and all exhibits and attachments hereto.

SECTION 2 – KCHA BACKGROUND

KCHA is a municipal corporation that was created in 1939 in order to provide housing assistance to low-income residents. KCHA operates in King County outside the Cities of Seattle and Renton, and administers over 18,000 low-income apartment units which provide housing for families, the elderly and the disabled. KCHA owns and directly manages approximately 3,200 federally assisted multi-family housing units and provides Section 8 housing assistance to another 10,000 households. Governed by a five-member Board of Commissioners that is appointed by the King County Council, KCHA has over 400 employees and an annual operating revenue budget of $462 million.

KCHA currently uses Unit4 Enterprise Resource Planning (Agresso) software for its primary Human Resource and Payroll functions. The solution does not provide the functionality required to support efficient and comprehensive processing for the impacted functional areas. KCHA is interested in receiving responses from all qualified Vendors that can provide software and implementation services who can meet the functional and technical requirements outlined in this RFP. This RFP is part of a competitive procurement process which helps to serve the best interest of KCHA and its residents, and will assist KCHA in selecting a qualified Vendor to provide HRIS software and implementation services.

It is anticipated that the new HRIS solution and successful implementation will:

- Position KCHA to meet its current and future strategic objectives.
- Make HRIS data available for reporting and analytics with end user query and reporting tools.
- Improve management of HRIS data throughout the organization.
- Automate manual processes, reduce paper and utilize automation where possible.
- Minimize the use of shadow systems.
- Promote the adoption of best practices and the development of policies and procedures.
- Provide intuitive systems that are easier to navigate.
- Adhere to and complement the desired technical architecture.

SECTION 3 – PROJECT SCOPE AND TIMELINE

Project Scope. The modules in scope for this HRIS solution solicitation include the following.

Modules	
▪ Human Resources	▪ Learning Management
▪ Timekeeping	▪ Reporting
▪ Payroll	

This table lists current solutions used by KCHA and their impact to the scope for this project:

Software	Function	Scope
Unit4 Enterprise Resource Planning (Agresso)	General Ledger Accounts Payable	Interface
Unit4 Enterprise Resource Planning (Agresso)	Human Resources Payroll	Replace
OnBase	Time Entry Notice of Personnel Actions (NOPA)	Replace
OnBase	Document Management	Possible Interface
SharePoint	HR Self-Service Time Entry	Replace
NeoGov	Applicant Tracking	Interface
Navex	Sexual Harassment Training	File Extract
Vena Solutions	Budgeting	Interface
State Pay1	Public Employee Benefits (PEBB) Medical, Dental, Life, LTD	File Extract
Washington State	DRS - PERS Retirement	File Extract
Empower Retirement	TPA - DCP 457b Retirement	File Extract
Navia Solutions	TPA – Flexible Spending - Health, Daycare, DRP	File Extract
DSHS	TPA – Reporting New Hires	File Extract
Sedgewick	TPA – FMLA Administration	File Extract

The solution selected will be implemented as mutually agreed to with the selected Vendor. KCHA expects process improvement throughout the implementation of new systems and intends to adopt the best practices offered by the selected Vendor. Vendors who are invited to demonstrate their product should be prepared to discuss the application's best practices.

Project Timeline. KCHA anticipate the following timeline for this project. This timeline may be adjusted as necessary to support the project.

Activity	Date
Release of RFP	July 22, 2022
Vendors Questions Submitted	August 5, 2022
Vendors Questions Answers Posted as Addenda	August 10, 2022
Proposals Due	September 1, 2022 – 2:00 PM PT
Selection of Finalists	September-October 2022

Software Demos	November-December 2022
Contract Negotiations	January-February 2023
Implementation Kick-Off	April 2023

SECTION 4 – RFP EVALUATION

Evaluation. An evaluation committee selected by KCHA will review and evaluate Vendor proposals using the criteria below. Clarification of submitted material may be requested of Vendors during the evaluation process. At its discretion, KCHA may award the successful Vendor based on their initial proposal, or invite them to enter directly into contract negotiations. Each proposal received in response to this RFP will be evaluated using the following scoring:

	Description	Scoring
Software	• Breadth of modules - offers all modules required • Depth of functionality – meets functional and technical requirements	30
Technology	• Adherence to IT strategy – platform, database, accessibility • Integration to other systems – experience and tools offered • Vendor adoption of technology at reasonable pace	15
Vendor	• Vendor viability and vision • Organizational strength • Experience with other government entities of similar complexity • References provide of similar entities and complexity	15
Total Cost	• Software license costs • Implementation services • Maintenance • Terms and conditions	15
Implementation	• Defined and proven implementation methodology • Address installation, requirements review, solution design, configuration, report development, training, testing, data conversion • Proposed project timeline • Staffing resources – availability and experience	25

KCHA expects to select the firm that is best qualified to provide the software and services described in the RFP based upon the evaluation criteria defined above. KCHA reserves the right to reject any or all proposals, and to waive any irregularities or information in the evaluation process. KCHA also reserves the right to re-evaluate Vendors who were not originally Short Listed at any time before the determination of a finalist is made. The final decision is the sole decision of KCHA, and the Vendors to this request have no appeal rights or procedures guaranteed to them.

Notification. Based on the evaluation of the proposals, KCHA will select a Short List of solutions and invite the Vendors to participate in pre-demo meetings and software demonstrations. The selected Vendors will be notified in writing or by email by the date indicated in Section 3. Vendors will be provided a Demo Script document that will be used to guide the software demonstrations.

Pre-Demo Meetings. KCHA will conduct pre-demo meetings with Short Listed Vendors. The purpose of the pre-demo meeting is to address any questions about logistics of the online or on-site demos or the KCHA Demo Script.

Software Demos. The functional and technical software demos will be presented to KCHA by the Short Listed Vendors according to the Demo Script provided. All Vendors must follow this script during their demo process. The evaluation criteria for the demo process will include adherence to the script as well as the ability to successfully demonstrate the product’s ability to meet KCHA’s functional and technical requirements. KCHA reserves the right to request additional information, interviews, follow-up demonstrations or any other type of clarification of proposal information it deems necessary to evaluate the finalist Vendors.

SECTION 5 – VENDOR INSTRUCTIONS

Vendor proposals should be prepared simply and include concise descriptions of the Vendor's ability to address KCHA's functional and technical requirements. Emphasis should be placed on completeness and clarity of content, not total content.

Complete proposals must be submitted via email according to the following guidelines:

- Email the proposal to: Therese Ross at thereser@kcha.org by the date and time specified in Section 3.
- Include one electronic PDF copy of your entire RFP proposal in the order defined in the table below. The PDF document should not exceed 100 pages and not exceed 25 MB in size. If the document is text based, it should not exceed 1 MB for 100 pages, but if it's imaged based (i.e. scanned) it could get up to 200 MB. Do not include marketing literature.
- Provide one electronic copy of the Requirements Section in Exhibit A using the separate Word document provided. *Do not change the formatting or file type of this document.*

Submission of a proposal shall constitute acknowledgment and acceptance of all terms and conditions contained in this RFP and all exhibits and attachments provided.

Questions about this RFP must be submitted via email to thereser@kcha.org according to the schedule provided in Section 3. No formal pre-proposal meeting will be held. Question-and-Answer addenda will be posted to the KCHA website on the due date.

From the date that this RFP is issued until a Vendor is selected and the award is announced, there will be no communication to any KCHA staff outside of the process outlined in this RFP. KCHA reserves the right to reject any proposal for violation of this provision. No questions other than written questions will be accepted, and no response other than written responses will be binding upon KCHA.

Proposal Response Format. In order to assist in the fair and equitable evaluation of all responses, Vendors are asked to adhere to the format outlined below. Responses that deviate from this format may be considered as non-responsive and subject to disqualification.

Section	Description
1. Cover Letter	Introductory letter indicating software and services offered relevant to the scope of work in this RFP. An individual authorized to bind the Vendor must sign the cover letter. Limit to 2 pages.
2. Requirements	Complete the Requirements document provided as a separate Word document and follow the directions provided in Section 6 of this RFP. Each Requirement must have a rating and a comment as to how the item is met with the software. Submit in PDF format and do not make any

Section	Description
	changes to formatting of this document. Do not provide hyperlinks within your response or refer to other pages or line items in your proposal to address the Requirements. A comment of “Standard Functionality” or something similar does not provide the information we need to evaluate Vendor proposals.
3. Pricing	Complete the Pricing document provided as Exhibit A of this RFP. Pricing must be comprehensive. Pricing must be valid for at least 180 days. **Software:** Provide software cost estimates for user counts indicated on the Pricing document. Include pricing for each deployment option including SaaS or On-Premises on a separate Pricing document if applicable. **Implementation:** Provide an estimate for all costs for implementation services including but not limited to implementation of the software, data conversion, system configuration, report development, testing, and training. List any optional costs separately. **Maintenance/Subscription:** Indicate the cost of annual Maintenance/ Subscription for 10 years. **Note:** Additional pricing details can be supplied as backup if it clarifies or provides relevant detail to your proposal.
4. Implementation	Provide an overview of the implementation methodology including: a. Project Plan: Sample Project Plan including Phases, Tasks, Timeline b. KCHA resources: Role, responsibilities, estimated time per month c. Vendor resources: Role, responsibilities, estimated time per month, resumes d. Process improvement: Approach to process improvement through implementation e. Data conversion: Methodology proposed and tools provided f. Testing: Methodology proposed and tools provided g. Training: Methodology proposed and tools provided h. Custom report development services i. Integration: Approach, tools, experience
5. Support	Provide an overview of support services recommended including but not limited to: a. System administration: Performance monitoring, tuning, loading of patches and version releases, back-up, redundancy, disaster recovery b. User support: Hours, average/guaranteed response time, ticketing system used, resources available, escalation process c. System enhancements: Approach to user enhancement requests d. Online training resources e. User groups and conferences
6. Technology	Provide an overview of the technology of the proposed solution including: a. Product roadmap b. Technical architecture

Section	Description
	c. Deployment options d. Technology specifications if on-premises deployment – server, desktop, etc. e. Multi-factor authentication f. SQL access to data g. System updates – timing, frequency, user adoption h. Compatibility with Citrix Virtual Apps (published desktops)
7. References	Complete the References document provided as Exhibit B of this RFP. Provide three references for current customers and two references for prior customers.
8. Performance	Indicate if at any time during the past five years Vendor has had a contract terminated for convenience, non-performance, or any other reason, or has entered into legal action with a customer. Describe the situation.
9. Contract Samples	Provide sample contract documents as applicable: a. Statement of Work b. Perpetual Software License or SaaS License Agreement c. Maintenance or Support Agreements d. Service Level Agreements e. Data Breach Policy
10. Reports	Provide a list and description of the standard reports delivered with the proposed software.

SECTION 6 – REQUIREMENTS

This section includes instructions on how to complete the Requirements section of your RFP response. Use the separate Word document of Requirements provided with this RFP. This will become Section 2 of your RFP response. For each item, a ranking has been provided indicating the importance to KCHA. Rankings used are "R" for Required, "I" for Important, "N" for Nice to Have, or "E" for Explore. Software applications that are missing a significant number of required features and technology preferences may be eliminated from consideration.

Proposers must provide a rating and a comment for every item. If the requirement does not pertain to the proposal being submitted, enter "N/A." The comment should include a brief explanation of how the item is supported. Please do not modify the format, font, numbering, etc. of this section or insert page breaks or convert from PDF to Word. If a submitted RFP includes blank responses, the document may be considered in violation and rejected.

Do not provide hyperlinks within your proposal and complete each line. Do not reference other lines to address a requirement.

Use the following rating system to evaluate each requirement:

Rating	Definition
4	**Standard**. Software supports this requirement and can be implemented with configuration at the proposed services cost. No source code modification is required.
3	**3rd party software.** Requirement is supported with a recommended 3rd party solution. Indicate the name of the application.
1	**Customization or modification.** Indicate timing required and estimated cost of customization or modification.
0	**Not available.** Software will not meet requirement.
F	**Future Release.** Requirement will be available in future release. Indicate anticipated release date month and year.

Sample Response Format: Please use the format below when completing your response.

	General	Response
R	1. Audit Trail with user, date, time stamp throughout all modules. Before/after values is Important.	4 System logs all transactions and stamps them with user, date, time, and before/after values. A report can be generated to review audit history.

Please note – a comment of "Standard Functionality" or similar does not provide us with the information required to review your proposal. Provide an explanation of how the software supports the requirement.

SECTION 7 – GENERAL TERMS

1) **Addenda**: In the event there are changes or clarifications to this RFP, KCHA shall issue an addendum. Addenda will only be sent to those firms who have registered with KCHA as having received an official copy of the RFP from KCHA. It is the responsibility of the respondent to check with KCHA prior to submittal deadline to ensure that all addenda issued by KCHA have been received or to call the KCHA contact named in this RFP.

2) **Rights reserved by KCHA**: KCHA reserves the right to waive any irregularities or informalities in the RFP and to reject any and/or all Statements of Qualification. KCHA will generally not disclose the number of responses received, the names of the respondents, or the status of negotiations until the Executive Director (or assignee) has approved the award of the contract. Selection of a firm does not confer any exclusive right to the selected firm to perform the scope of work or the potential additional scope of work.

3) **Basic Eligibility**: If the successful firm has nexus in the State of Washington, they must provide their Washington state UBI number to be properly authorized to perform the proposed services. In addition, the successful respondent must not be debarred, suspended or otherwise ineligible to contract with KCHA, and must not be included on the General Services Administration's (GSA) "List of Parties Excluded from Federal Procurement and Non-procurement Programs" or HUD's "Limited Denial of Participation" list.

4) **Payment Requirements**: Respondents should be aware that KCHA will only make payments on the contract issued under this RFP after that portion of the work being billed has been completed and will pay reimbursable expenses to the Firm only upon receipt of an invoice for the reimbursable expenses. No advance payments will be made to the awarded Firm, who must have the capacity to meet all expenses in advance of payments by KCHA.

5) **Records Made Public**: All documents submitted to KCHA will become public record, as per RCW 42.17. If you are submitting information which you think is "confidential" or "proprietary" to your firm, KCHA recommends that you do not submit that information as part of this RFP. KCHA cannot guarantee that type of information will be withheld from a public disclosure request.

6) **Fair Housing:** In accordance with Section 504 of the Rehabilitation Act of 1973; the Americans with Disabilities Act of 1990; the Architectural Barriers Act of 1968 and the Fair Housing Act of 1988, the purpose of this Notice is to remind recipients of Federal funds (in this instance, the Public Housing Authority) of their obligation to comply with pertinent laws and implementing regulations which provide for non-discrimination and accessibility in Federally funded housing and non-housing programs for people with disabilities.

   Public housing agencies (PHAs) and other recipients of Federal funds are responsible for providing this Notice to all **current** and **future** contractors participating in covered programs/activities or performing work covered under the above subject legislation and implementing regulations.

   To read the full text of the Notice: Go to www.kcha.org, click on "Doing Business with the King County Housing Authority" and then click on and read **"Fair Housing/Accessibility Notice."**

7) Insurance:

The firm awarded the contract shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the firm, its agents, representatives, or employees. The cost of such insurance shall be borne by the firm.

Minimum Scope and limits of Insurance:

Coverage shall be at least as broad as:

a) Automobile Liability: $300,000 per accident combined single limit.
b) Workers' Compensation insurance as required by Washington State law.

8) Deductibles and Self-Insured Retentions:

Any deductibles or self-insured retentions in excess of $25,000 must be declared to and approved by KCHA. At the option of KCHA, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects KCHA, its officials, officers, employees, partners, volunteers and agents; or the firm shall provide a financial guarantee satisfactory to KCHA guaranteeing payment of losses and related investigations, claim administration and defense expenses.

9) Verification of Coverage:

The firm shall furnish KCHA with acceptable proof of insurance before commencing work, including but not limited to an endorsement naming KCHA as an additional insured.

10) Firm's Insurance is Primary

The firm's insurance coverage shall be primary insurance with respect to KCHA, its officers, officials, employees, and volunteers and shall apply separately to each project or location. Any insurance or self-insurance maintained by KCHA, its officers, officials, employees or volunteers shall be excess of the firm's insurance and shall not contribute with it.

11) **Indemnification and Hold Harmless Requirements**

The firm hereby agrees to indemnify, defend, and hold harmless the KCHA, its successors and assigns, director, officials, officers and employees, volunteers, partners, and agents (all foregoing singly and collectively ("Indemnities"), from and against any and all claims losses, harm, costs, liabilities, damages and expenses, including, but not limited to, reasonable attorney's fees arising or resulting from the performance of the services, or the acts or omissions of the firm, its successors, and assigns, employees, subcontractors or anyone acting on the firm's behalf in connection with the contract to be executed based on this RFP or its performance under such Contract.

PROVIDED, however, that the firm will not be required to indemnify, defend, or save harmless the indemnitee as provided in the preceding paragraphs of this section if the claim, suit, or action for injuries, death, or damages is caused by the sole negligence of the indemnitee. Where such claims, suits, or actions result from the concurrent negligence of (a) the indemnitee or the indemnitee's agents or employees and (b) the firm or the firm's agent or employee, the indemnity provisions provided in the preceding paragraphs of this section shall be valid and enforceable only to the extent of the firm's negligence or the negligence of its agents and employees.

Exhibit A – Pricing Summary

Use this template as Section 3 of your response to provide pricing for the software in scope. Provide a separate pricing sheet for on-premises and Hosted/Cloud options if available. Supporting detail may also be provided. Pricing must be comprehensive and list any available discounts.

King County Housing Authority		
HRIS Software – 550 W2s		
Software	**$**	**Assumptions**
Human Resources		
Learning Management		
Timekeeping		
Payroll		
Other:		
Sub-Total Software		
Implementation	**$**	**Assumptions**
Implementation		
Data Conversion		
Training		
Report Development		
Integration		
Travel		
Other		
Sub-Total Implementation		
Maintenance/Subscription	**$**	**Assumptions**
Year 1		
Years 2-10		
Sub-Total Maintenance/Subscription		
Total		

Exhibit B
Customer References - Current

Item	Response
Current Customer #1	
Name	
Employee count	
Contact name and title	
Contact telephone and email	
Software and services provided to customer	
Implementation duration and go live date	
System replaced	
Current Customer #2	
Name	
Employee count	
Contact name and title	
Contact telephone and email	
Software and services provided to customer	
Implementation duration and go live date	
System Replaced	
Current Customer #3	
Name	
Employee count	
Contact name and title	
Contact telephone and email	
Software and services provided to customer	
`Implementation duration and go live date	
System replaced	

Exhibit B
Customer References - Prior

Item	Response
Prior Customer #1	
Name	
Employee count	
Contact name and title	
Contact telephone and email	
Software and services provided to customer	
Implementation duration and go live date	
Reason reference is a prior customer	
System replaced	
Prior Customer #2	
Name	
Employee count	
Contact name and title	
Contact telephone and email	
Software and services provided to customer	
Implementation duration and go live date	
Reason reference is a prior customer	
System Replaced	

Exhibit C
Reports and Shadow Systems

Report Name	Module/Path
I9 Expiration Dates	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEES WITH I9 EXPIRATION DATES
AAP New Hires	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > AFFIRMATIVE ACTION > AAP NEW HIRES
AAP Snapshot	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > AFFIRMATIVE ACTION > AAP SNAPSHOT
AAP Terminations	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > AFFIRMATIVE ACTION > AAP TERMINATIONS
AAP Transfer and Promotions	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > AFFIRMATIVE ACTION > AAP TRANSFER AND PROMOTIONS
ACA - Health Data	
ACA - Payroll Data	
ACA - PCORI Fee	
ACA 1095-C and 1094	
Annual Leave and Max Balance	
Annual Leave Balance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > ANNUAL LEAVE BALANCE
Benefits Statement	
Bonus Referral	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS>BONUS REFERRALS
Building Trades Monthly Union Report	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > UNION REPORTS > BUILDING TRADES MONTHLY UNION REPORT
Comp Time Balance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > COMP TIME BALANCE
Confirmed Pay Plan - Admin	REPORTS > GLOBAL REPORTS > COLA > CONFIRMED PAY PLAN - ADMIN
Confirmed Pay Plan - Building Trades	REPORTS > GLOBAL REPORTS > COLA > CONFIRMED PAY PLAN - BUILDING TRADES
Current Position and Current Hourly Rate	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > CURRENT POSITION AND CURRENT HOURLY RATE
Date of Hire	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > DATE OF HIRE
Disability Status	
Driver's License Report	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > DRIVER'S LICENSE REPORT

DRP Report on FSA	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > DRP REPORT ON FSA
DSHS - Reporting new hires	
EE Out Of Class	
EE Out Of Class with Race and Gender	
EE Working out of class	
EEO Report - Full Time	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > EEO REPORTS > EEO REPORT - FULL TIME
EEO Report - New Hires	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > EEO REPORTS > EEO REPORT - NEW HIRES
EEO Report - Part-Time	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > EEO REPORTS > EEO REPORT - PART TIME
Employee Annual Salary	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEE ANNUAL SALARY
Employee Benefits Statement	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > EMPLOYEE BENEFITS STATEMENT
Employee Headcount	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEE HEADCOUNT
Employee Notification	
Employee Rate History	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEE RATE HISTORY
Employee Relations	
Employee Terminations with Performance Rating	Reports, HR/PR Reports/Other/Employee Terminations with Performance Rating
Employees and Positions	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEES AND POSITIONS
Employees Union and Account	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > UNION REPORTS > EMPLOYEES UNION AND ACCOUNT
Employees, hire date & position	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EMPLOYEES, HIRE DATE & POSITION
Executive Salary History	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > EXECUTIVE SALARY HISTORY
FMLA Eligibility Report	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > FMLA > FMLA ELIGIBILITY REPORT
FMLA Hours Taken	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > FMLA > FMLA HOURS TAKEN
FSA DayCare	
FSA Health	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS>FSA Health

Gender Count	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > GENDER COUNT
Gender Count - BWI	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > GENDER COUNT - BWI
Gross Earnings by Gender	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > GROSS EARNINGS BY GENDER
HAI Group Term Life Insurance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > HAI GROUP TERM LIFE
Headcount - Exclude Laundry, Key & Compactor	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > HEADCOUNT - EXCLUDE LAUNDRY, KEY & COMPACTOR
Headcount Less than 100% FTE	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > HEADCOUNT LESS THAN 100% FTE
Headcount Report - All	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > HEADCOUNT REPORT - ALL
HR Query Report - Based on P&D In List	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > FMLA > HR QUERY REPORT - BASED ON P&D IN LIST
IA - Employees with I9 Expiration Dates in 3 Month	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > IA - EMPLOYEES WITH I9 EXPIRATION DATES IN 3 MONTHS
Incentive Leave Balance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > INCENTIVE LEAVE BALANCE
KCHA Employee Rate Check	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > SALARY REVIEW > KCHA EMPLOYEE RATE CHECK
Laundry Attendant Hourly Rate	
Leave Accrual - Current Rate by Resno	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > LEAVE ACCRUAL - CURRENT RATE BY RESNO
List of Active Positions and Relations	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > LIST OF ACTIVE POSITIONS AND RELATIONS
Lost Time to FMLA L&I	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > FMLA > LOST TIME TO FMLA L&I
Lump Sum Payments in Lieu of COLA	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > SALARY REVIEW > LUMP SUM PAYMENTS IN LIEU OF COLA
Medical Insurance Cost Analysis	
Medical Premiums	
Merit Report	
New Hire with email - Sexual Harrasment Training	
Non-Represented Salary History	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > NON-REPRESENTED SALARY HISTORY
OPEB Actuarial	

Open Enrollment Data	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > BENEFITS STATEMENT
Paid and Unpaid Leave Time	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > PAID AND UNPAID LEAVE TIME
PEBB Optional Life	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > PEBB OPTIONAL LIFE
PEBB Optional LTD	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > PEBB OPTIONAL LTD
Performance Appraisal Due	
Personal Holiday Balance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > PERSONAL HOLIDAY BALANCE
Position Status Changes	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > POSITION STATUS CHANGES
Position Updated Today	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > POSITION UPDATED TODAY
Proposed Pay Plan - Admin	REPORTS > GLOBAL REPORTS > COLA > PROPOSED PAY PLAN - ADMIN
Proposed Pay Plan - Building Trades	REPORTS > GLOBAL REPORTS > COLA > PROPOSED PAY PLAN - BUILDING TRADES
Pro-rated Medical Premiums	
Rate Status Changes	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > RATES STATUS CHANGES
Represented (Union) Employee Census	
RESNO Field is Empty	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > RESNO FIELD IS EMPTY
Salary Review	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > SALARY REVIEW
Salary Review - Over Max - IntellAgent	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > SALARY REVIEW > SALARY REVIEW - OVER MAX - INTELLAGENT
Salary Review - Under Min - IntellAgent	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > SALARY REVIEW > SALARY REVIEW - UNDER MIN - INTELLAGENT
Section 3 - New Hires List	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > SECTION 3 - NEW HIRES LIST
Sick Leave Balance	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > LEAVE BALANCES > SICK LEAVE BALANCE
STT & LTT Status Employees	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > STT & LTT STATUS EMPLOYEES
Temporary Out of Class	
Temporary Staff	

Tuition Reimbursement	REPORTS > GLOBAL REPORTS > HR/PR REPORTS >OTHER> TUITION REIMBURSEMENT
Turnover Ratio	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > TURNOVER RATIO
Union Negotiation Data Rpt	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > UNION REPORTS > UNION NEGOTIATION DATA RPT
Union Employees with Hourly Rate Overrides	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > UNION REPORTS > UNIONIZED EMPLOYEES WITH HOURLY RATE OVERRIDES
United Way	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > BENEFITS > UNITED WAY
Vacant Positions	REPORTS > GLOBAL REPORTS > HR/PR REPORTS > OTHER > VACANT POSITIONS
Year End Tasks	

Shadow System	Format	Description and Purpose
AAP New Hires	Excel Spreadsheet	An annual report listing all new hires from July 1st to June 30th and sent to the TPA Affirmity who compiles and conduct data analysis who then submits the final report to
AAP Snapshot	Excel Spreadsheet	An annual report listing all new hires from July 1st to June 30th and sent to the TPA Affirmity who compiles and conduct data analysis who then submits the final report to
AAP Terminations	Excel Spreadsheet	An annual report listing all employee terminations from July 1st to June 30th and sent to the TPA Affirmity who compiles and conduct data analysis who then submits the final report to
AAP Transfer and Promotions	Excel Spreadsheet	An annual report listing all employee Transfers and Promotions from July 1st to June 30th and sent to the TPA Affirmity who compiles and conduct data analysis who then submits the final report to
ACA - Health Data	WA State PEBB Pay 1 System	An annual report capturing all employees and dependents demographic and health plan selection. All data includes employees who are active, enrolled in COBRA after termination and retirees for that particular year. The data on the report is shared with our ACA TPA and they use/manipulate all the data to generate the Form 1095-C. This is a Federal mandate requiring large Employer to report employees health plan election and coverage for that year.

ACA - Payroll Data	Excel Spreadsheet	An annual report capturing all employees who were paid or recieved W-2 from KCHA. The report includes active, terminated and retirees and everyone who recieved W-2 from KCHA. The data on the report is shared with our TPA Sky Insurance Tech and they use the payrol data and health data from PEBB and manipulate to generate the Form 1095-C. This is a Federal mandate requiring large Employer to report employees health plan election and coverage for that year.
ACA - PCORI Fee	Excel Spreadsheet	List of employees enrolled in Fully insured medical plans (Kaiser Permanente). The report captures # of employees enrolled in Kaiser Permanente and then multiplied by the PCORI rate established by the IRS. The data and amount owned by KCHA are needed to complete IRS Form 720. KCHA send the completed Form 720 to IRS along with the check payment. This is part of the ACA Employer Mandate.
ACA 1095-C and 1094	Sky Insurance Tech Consultant	Both report from PEBB and Agresso are uploaded in the Sky Insurance Portal. Sky Insurance Tech Staff manipulates both Payroll and Medical data and generate the Form 1095-C. CM audits all form 1095-C, print, stuff and mail out by due date, typically sometime in February.
Building Trades Monthly Union Report	Excel Spreadsheet	List of represented employees that includes employee demographics (name, home and work address, home and work phone number, position title, hired and termination date, hourly rate, steps, union affiliations, etc.). Monthly report.
Calculating Merit and COLA	Excel Spreadsheet	Spreadsheet calculating employee adjusted rate by multiplying the pre-merit and COLA rate X merit percentage + (X COLA percentage) and adding the results to get to the new employee hourly rate.
Calculating Merit and COLA when returning to position	Excel Spreadsheet	Spreadsheet calculating employee return to position rate by multiplying the pre-TOOC rate X merit percentage + (X COLA percentage) and adding the results to get to the adjusted employee hourly rate.
Calculating Merit and COLA while on Temporary Out of Class	Excel Spreadsheet	Spreadsheet calculating employee adjusted rate by multiplying the base rate X merit percentage + (X COLA percentage) and adding the results to get to the new employee hourly rate.
Driver's License Report	Excel Spreadsheet	On an annual basis, Risk Management request list of employees Driver License information for staff whose driving is an essential function of the job . This report is required to renew KCHA Staff auto insurance and shared with our TPA.

DRP Report on FSA	Excel Spreadsheet	List of employee demographic for new hires, enrollment, terminations, special open enrollment, demographic and dependent changes. The DRP update/report enable Navia to approve or denied employee claims. This report is uploaded to the NAvia portal.
DSHS - Reporting new hires	Agresso	List of new hires and their demographics. It is part of State compliance for Employer to report new hires to DSHS within 20 days of employment.
Employee Notification - Regular, LTT and STT	OnBase	Electronic notification communicating REgular and LTT new hires and terminations. This notification goout to a group of internal stakeholders so that they can do their departmental tasks in order to set up new employees access such as phone, internet, equipments, company key fob, company issues cellphone, systems, etc. This notification also serves to disconnect employee access once terminated/separated from employment.
Employee Notification - Temporary Agency and Union Hall	OnBase	Electronic notification communicating Temp Agency Temp and Union Hall new hires and terminations. This notification go out to a group of internal stakeholders so that they can do their departmental tasks in order to set up new employees access such as phone, equipments, company key fob, systems, etc. This notification also serves to disconnect employee access once terminated/separated from employment.
Employee Notification - Promotion, Demotion, Reclassification, Transfer, Temporary Out of Class, Miscellaneous such as Name Change, Supervisor Change, etc.	OnBase	Electronic notification communicating employee movements such as Promotion, Demotion, Reclassification, Transfer, Temporary Out of Class, Miscellaneous ,etc. This notification go out to a group of internal stakeholdes so that they can update and/or set up all the necessary access to various systems, etc.
HAI Group Term Life Insurance	Excel Spreadsheet	Reporting employees census to TPA. The report includes demographics for new hires and terminated employees. This report updates KCHA employees census with HAIG Life Insurance Company. Bi-weekly report.
Laundry Attendant Hourly Rate	Excel Spreadsheet	List of all Laundry Attendant employees who earns minimum wage. This report updates and tracks employee name, buidling they are working and number of laundry room they are responsible for.

Medical Insurance Cost Analysis	Excel Spreadsheet	Massive spreadsheet capturing medical insurance cost analysis, comparing last year to current year using employee enrollment census, etc. This cost analysis is done annually necessary for budget and for identifying next year monthly medical premium for all employees.
Medical Premiums (EE Portion)	Microsoft Word/Table	Captures different types of employee monthly medical premium based on several medical plans and coverage type such as EE only, EE plus Children, EE plus Spouse and EE plus Family. The report also captures three different exhibits such as No Spouse/DP, Spouse/DP Double coverage and Spouse/DD WAIVED coverage. This determine employee monthly medical premium based on what plan and coverage election.
New Hire list	Sharepoint Registration and Manually pulling info from Employment Application	Captures list of new employee attending new hire orientation. This report should inlcude Employee Name, Phone Number, Email address, Supervisor Name, Properties, Position Title. This is needed for NEOP Logistics preparation for either virtual or on person orientation.
NOPA for (New Hires, Separation of Employment, Merit, Promotion, Demotion, Temporary Out of Class, Transfer, Demographic Changes, Miscellaneous, Reclassification)	On Base (called Enterprise Content Management - ECM)	Electronic Notice of Personnel Action (NOPA) is an online OnBase form that pulls basic demographic employee information from Agresso such as name, position title, hourly rate. Once the form has been completed, all the updated data is entered to Agresso.
OPEB Actuarial	Excel Spreadsheet	List of employees enrolled in PERS Retirement. Windy work with a Consultant/Actuarial to generate the final report before sending to Department of Retirement Systems (DRS). Annual report for Windy Epps.
Open Enrollment Census - PEBB	PEBB Email/Report	List of employees who made changes during OE such as changing medical and/or dental plans, adding/removing dependents, change in Tobacco use, enroll/change LTD waiting period, etc
Performance Appraisal Due	Excel Spreadsheet	List of employees Performance Appraisal past due within 30days, 60days, 90days, etc. This report includes employees name, position title and days their PA is past due. The list is designed to remind Deparment Manager/Director who and how many staff's PA are past due.
Pro-rated Medical Premiums	Excel Spreadsheet	This spreadsheet captures pro-rated medical premium rate for part-time employee working 20 to less than 32 hours a week. A spreadhseet is generated based on employees hours per week multiplied by the rate based on the pro-rated amount and medical plan selection.

Represented (Union) Employee Census	Excel Spreadsheet	List of Building Trades members. This report captures current BT members and it includes all demographic data such as name, home and work address, home and work phone numbers, position title, worksite location, hourly rate, union affiliation, hired and separation date
Section 3 - New Hires List	Agresso	List of all new hires, including regular, STT and LTT. This report captures new employee name, position title, employment status, hourly rate and Section 3 category. This report is used track recently new hires who need to be reported to DRS as new member or returning member.
Temporary Staff	Excel Spreadsheet	List of current Temp Agency Temp and Union Temps. This report captures employee name, hourly rate, property or department they are working, duration of their employment, supervisor and name of the temp agency or union hall they came from.
Turn Over Ratio	Excel Spreadsheet	Captures the total number of workers who leave KCHA over a certrain period of time. The report includes voluntary and non-voluntary separations.
Year End Tasks	Excel Spreadsheet	Detailed list of all the HR initiatives/tasks during OE and year-end (Oct - Jan). This spreadhseet includes all Open Enrollment preparation, coordination and execution and everything OE related tasks. It also captures Annual COLA prepration and executive, United Way Campaign if applicable, L & I related compliance such as OSHA 300, completing annual survey such as US Dept of Commerce/US bureau, Annual flu shot if applicable, NEOGOV updates for salaries and benefits, ACA related compliance, NEOP scheduling and other logistics tasks, any Federal and State compliance such as required Posters, Laundry Attendant new minimum wage calculations, etc.
Retired Employees List	Excel Spreadsheet	List of Retired employees.
Retirement Forecast Report	Excel Spreadsheet and chart	List of employee retirement forecast per deparment, per region, etc.
Organization Chart	Word	Captures staffing chart such as Senior Staff, Department, Regional, etc. When changes occurs, system should be able to update easily vs. manually.
FMLA Usage Report		