## Request for Information:  HUMAN RESOURCES AND PAYROLL SOLUTION(S)

**Issue Date:  November 8, 2019**

**Brief Description of Requirement:**
The Office of Management and Enterprise Services (OMES) is responsible for human resources and payroll solutions for the State of Oklahoma. OMES is seeking information regarding a single or multiple solutions for the following:

- Time and labor
- Payroll processing and all ancillary functions
- Online benefits system
- Performance management system
- Cloud-based compensation and job description management
- Onboarding
- Workforce planning

**Direct response submissions and clarifying questions to:**

Name: Robert Goad
Address: 5005 N. Lincoln Blvd
Oklahoma City, OK 73105
Email: robert.goad@omes.ok.gov
Phone: 405-522-5103

**Response Due Date:  December 31, 2019      Time: 3:00 pm CST**
Responses should include the responders contact information.

**Issued By:  The Office of Management & Enterprise Services**

**To: All Interested Parties**

**REQUEST FOR INFORMATION (RFI)**

**This is not a solicitation**

The State of Oklahoma invites all interested parties to submit a written response to this Request for Information (RFI). This RFI is being sought strictly for the purpose of gaining knowledge of services and applications available with an estimate of their corresponding costs and **should not be construed as an intent, commitment, or promise to acquire services, supplies, or solutions being offered**. **No contract will result from any response to this RFI.**

Information submitted in response to this RFI will become the property of the State of Oklahoma and will not be returned. The State of Oklahoma will not pay for any information herein requested nor is it liable for any cost incurred by the Supplier.

**RFI responses** must be received no later than 3:00 pm CST, December 31, 2019, by mail or email delivery to:

Name: Robert Goad
Address: 5005 N. Lincoln Blvd
Oklahoma City, OK 73105
Email: robert.goad@omes.ok.gov
Phone: 405-522-5103

**Clarifying questions** may also be directed to Robert Goad. Clarification questions will only be accepted until 3:00 p.m. CST, December 12, 2019.

We appreciate your response to this request.

**Purpose and Objectives**

**Section A.** The State of Oklahoma, Office of Management and Enterprise Services (OMES) is requesting information for integrated or separate payroll and human resources solutions. OMES is open to a single solution for all functions or multiple 'best of breed' solutions for specific functions.

**Section B. This is a Request for Information (RFI) only.** This RFI is being issued solely for information and planning purposes; **it does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future.** This RFI does not commit the State of Oklahoma to contract for any supply or service whatsoever. Further, the State of Oklahoma is not at this time seeking proposals and will not accept unsolicited proposals. The State of Oklahoma is unable to fund any unbudgeted liability. Responders are advised that the State of Oklahoma will not pay for any information or administrative costs incurred in response to this RFI; all costs associated with responding to this RFI will be solely at the responder's expense. If a solicitation is released, it will be released by the Office of Management and Enterprise Services, as required by state law, on their website:

https://omes.ok.gov/services/purchasing/solicitations

It is the responsibility of potential Suppliers to monitor the Office of Management and Enterprise Services/Procurement website for additional information, should OMES proceed with an RFP.

**Section C. Current Process and Potential Scope**

This section will provide information about the state's current process. The state has constitutional and statutory requirements that inhibit flexibility in some areas. OMES is open to changes in business processes when possible and beneficial to the state, but suppliers must have the flexibility to accommodate business processes that cannot be changed.

The Office of Management & Enterprise Services (OMES) facilitates state payroll and human resources through two separate divisions.  The state includes over 35,000 employees from approximately 120 separate agencies in various locations throughout the state. Time and labor and payroll are currently handled within the PeopleSoft HCM module, with some exceptions. Benefits are handled through a separate system.  Certain relevant background information is below. The following information is provided to give the respondent an idea of the potential scope.

**Time and Labor**

- The primary time and labor system for the state is currently the PeopleSoft HCM module, which includes a member self-service application. However, six agencies use a different application and upload information to PeopleSoft. One agency is using Time Clock Plus.

- For many state employees time must be coded to one of many projects used for internal billing and grant reporting.

- Agencies define their own work weeks that may include alternate work schedules and midnight divide shifts that cross over midnight.

- Agencies may offer overtime, compensation time or a combination of both to exempt and non-exempt employees. The state currently has 19 absence plans within five categories.

- The state allows employees to accrue compensatory time (74 O.S. §840-2.15). There are currently four compensatory time plans in use.

- There are maximums for various types of accrued leave. For example, an employee may accrue up to 680 hours of leave but may only be paid for 480 hours of leave if they terminate employment. These amounts vary based on years of service. The solution should include the ability to track when leave will be forfeited based on business rules (74 O.S. §840-2.20).

- Leave accrual amounts are based on years of service and the accruals should be automatic based on service years. Thresholds change at 5 years, 10 years, and 20 years of service.

- The current system includes an absence plan configuration that prevents employees from taking more leave than they have accrued.

- The state currently does not have an absence management application. OMES is interested in adding the following absence management capability:

  o Allow employees to request leave and route to the manager for approval.

  o Allow manager's to approve/deny leave requests and notify employee of action.

  o Provide the ability for managers to view a calendar showing leave requests for his/her employees.

  o Provide the ability for managers to see data for all of their employees – not just down one or two levels.

  o Allow employees to forecast leave accruals.

- There is currently no central timecard solution that meets the needs of all state agencies. The state is looking for a more robust timecard solution, that would include the following capabilities:

  o Provide the ability for employees to clock in and out;

  o Provide for the recording of employee time via a time clock, badging in and out, or a mobile device;

  o Have the ability to record time by time in/out or elapsed time.

  o Allow managers or time keepers to enter time on behalf of an employee.

  o Pull approved leave into the timecard;

  o Provide the ability to update and/or delete time pulled into the timecard;

  o Allow for employees to have multiple jobs and different time reporting requirements based on the job or the agency for which they work.  For example, an employee may be required to enter project information on the timecard for one job (or agency) and may not be required to enter project information on the timecard for another job (or agency).

  o Provide multiple views of the timecard (by reporting period, by week, by month, etc.).

  o Define the reporting codes an employee can use on their timecard.

  o Allow employees to report time as positive pay or exception pay.

    ▪ Positive pay – enter all hours and leave worked during the pay period.

    ▪ Exception pay – enter only the leave hours or overtime hours worked during a pay period.

  o Provide the ability to report shift differential pay.

  o Provide the ability to report non-hours on timecard (enter amounts to be paid).

  o Allow entering adjustments.

  o Setup rules to calculate overtime or compensatory time.

  o Provide the ability to setup holiday calendars for state holidays as well as banking holidays.

  o Provide user-defined fields (drop down) fields for time card entry.

  o Provide the ability to define and apply business rules. For example:

    ▪ 28-day cycle (law enforcement);

    ▪ Alternate work-week schedules;

- Work weeks that start mid-day;

- Multiple work weeks.  Most agencies use a Sunday-Saturday work week but some agencies have other schedules.

- Provide the ability to maintain schedules for an employee.

- Allow managers to view timecards for all of his/her employees (not just the next level).

- Time Clocks are used by some agencies. OMES is looking for a solution that includes the following:

  - Provision of devices to clock in and out.
    - May include biometrics (finger scan, badge swipe, etc.)
  - Allow for agencies to use laptops or mobile phones to clock in/out.
  - Allow users to specify the job (multiple job employees) for which they are reporting time.
  - Allow employees to specify time reporting codes (regular pay, shift differential, etc.) as well as leave codes (annual, sick, military, jury).
  - Ability to reconcile if an employee forgets to punch in/out.
  - Ability to pull employee information from HR through API or batch interfaces.
  - Provides punched time or elapsed time to payroll through API or batch interfaces.
  - Geo-fencing capabilities by employee or group of employees.
  - Provide overtime/compensatory time calculations in accordance with federal and state rules.
    - Includes 28-day cycle employees (law enforcement).
  - Ability to apply rules to determine breaks, lunch periods, etc.
  - Ability to maintain employee schedules.
  - Ability for managers or time keepers to approve time.
  - Allow managers or time keepers to report (or update) time on behalf of the employee.
  - Send notifications/alerts to managers or time keepers based on rules.
  - Provide flexible reporting tools that includes dashboards/metrics.
  - Agencies who continue to use a separate time clock will need to extract data and import into the system of record.

**Payroll**

- All agencies are covered under the same Federal Employer Identification Number (FEIN) with the state as common paymaster. The State Comptroller is currently the authorized representative for the state.

- For Oklahoma state unemployment, each agency is treated as a separate employer. State law allows agencies to elect to be *covered*, by contributing at a set rate, or *reimbursing*, which requires no contribution through payroll.

- Each agency performs certain payroll processing tasks but payroll flows through a central agency (OMES) for review and then to the State Treasurer for payment. State law requires that all payments from the state are produced by the State Treasurer from the State Treasurer's account.

- The approval process for payroll currently varies by agency. OMES is interested in a flexible workflow for payroll approvals that can be configured to agency needs.

- Once a payroll is submitted to OMES for approval, the agency staff may no longer make any changes to the payroll or cancel the payroll.

- Agencies may be on monthly or bi-weekly pay cycles or a combination. Some agencies require 28-day cycles for law enforcement officials.

    - For monthly payroll, payday is the end of the month being paid. Processing happens prior to the end of the pay period and any adjustments are made on a supplemental payroll after the pay period.

    - For bi-weekly payroll, payday is two weeks after the pay period. The pay period is complete before processing begins.

- Agencies may offer overtime, compensation time or a combination of both to exempt and non-exempt employees. The state currently has 19 absence plans within five categories.

- Employees may be paid for amounts above the base salary, i.e. uniform allowance, skill-based pay, etc. This may be a defined amount or a percentage.

- Employees receive an annual longevity payment based on their years of service. OMES desires the capability to pull longevity amounts into payroll each month as it is due based on the employee's service date (74 O.S. §840-2.18).

- Balance adjustments are performed centrally for all agencies. Individual agency personnel do not have access to adjust balances.

- Employee withholdings and state contributions are either processed centrally or by the individual agency, depending on the type.

- Garnishments are maintained by each specific agency and are received from many creditors including federal debts, child support, student loans, state debts, and credit card or other debts from within and outside the state.

- The state has six retirement systems that receive remittances through state payroll and the calculations for each are different. Within each plan there are multiple calculations based on the agency or the employee. Each system has specific monthly and annual reporting requirements. Some plans include a 457(b) component.

- State employees may work in other states and typically there are remittances to several states in addition to Oklahoma.

- The state's W-2s, W-2C's and other payroll reports are currently handled centrally under the State Comptroller. W-2s are currently paper but OMES desires to start issuing electronically.

- The state has a constitutional requirement that the agency must have both available budget and cash before payment can be made. Payroll goes through a budget-checking process before payment.

- Each agency has designated funds within the State Treasurer's overall bank account. Detail information regarding employee funding streams must be maintained for a variety of purposes such as grants, projects, and billings. This funding information flows from the state's financial system to the payroll system. All available chartfield funding changes are initiated in the financial system and messaged to payroll.

- Summary payroll information must be interfaced into the state's financial system prior to payment. Detail payroll information must be available and interfaced for state transparency.

- Employees are currently paid through accounts payable for expense reimbursements. Employee payment information is interfaced from the payroll system to the accounts payable system.

- OMES desires the ability to perform mass updates such as pay raises, job or location changes, year-end funding updates as well as the ability to do mass payroll cancellations.

**Human Resources - General**

- Various levels of data are maintained centrally. The state's HCM system houses both personal and job data for each employee.

- Position data flows down to the employee hired into that position but may be overridden at the employee level.

- Effective dating is used to maintain historical records.

- Each personnel action requires an action/reason code.

- An employee may hold more than one job either within an agency or among different agencies. Benefits are attached only to the main/primary job.

- Employees often move from one state agency to another. Currently, the transfer is processed centrally because of security. The state does not permit one agency to view the employees of another agency. Once the transfer is complete the first agency can no longer see the data of the transferred employee. OMES would prefer that the first agency be able to see the information related to the time period in which the employee worked for that agency.

- The state does have non-resident alien employees. Currently the state is not providing treaty benefits but may at some point decide to do so. 1042 tracking ability is desired.

- An employee self-service application allows employees to maintain basic personal data in the system such as addresses, emergency contacts, emails, direct deposit information.

- A manager self-service function is available that allows managers to see basic information on employees as well as trigger events for an employee (raises, promotions, demotions, transfers).

- Workflows for approval of personnel transaction within each agency varies by agency. There is currently no centralized tool for this process.

- OMES desires the ability to perform mass updates such as pay raises, job or location changes, year-end funding updates.


**Human Resources – Benefits**

- OMES supports online annual enrollment for approximately 33,000 employees.
- Employees must enroll in health, dental, life, and disability insurance, with some exceptions (74 O.S. §1370)
- Employees may choose between one of the state's self-insured plans or a variety of HMOs.
- Each employee receives a benefit allowance to help defer the cost of benefits.  The benefit allowance amount varies based on whether the employee is single, married, or is covering one child or two or more children.
- Employees may opt out of coverage and will still receive a $150 benefit allowance (74 O.S. §1370).
- Employees may elect premium conversion to pay benefits on a pre-tax basis. This is currently a default in the benefits administration system.
- Coverage begins on the first day of the month following the employee's start date and ends on the last

day of the month in which the employee terminate employment or goes from permanent to temporary status.

- Employees may transfer from one agency to another but benefits remain the same.
- Employees on bi-weekly pay schedules have benefits deducted from 24 of the 26 pay periods (2 per month).
- Various roles are involved in the administration of state benefits:
    o Benefit Coordinators (BC) at each state agency provide administrative assistance to employees.
    o Flexible Benefit Representatives (FR) have the ability to override eligibility. They oversee all agencies and all state employee benefits.
    o Benefits Administration Group (IT group) handles configuration access for plans, rates, etc.
    o Accounting handles FSA and premium auditing. This group is at the state level and oversees all agencies. This group must have access to payroll reports.
- The current system is outdated. In addition to the bullet points listed above, following are some capabilities OMES desires in a benefits system.
    o Ability to support online enrollment for newly eligible employees, annual option period, and mid-year qualifying event changes.
    o A workflow process for management approval that works within the online application.
    o Ability to lock out enrollments and changes by employees after the enrollment or option period, while allowing benefit representatives access to make changes after the period closes.
    o Ability for employees to choose from multiple health, dental, & vision plans from different providers.
    o Ability to restrict enrollments by zip code.
    o Ability to handle multiple life events within a 30 day period.
    o Ability to define eligibility profiles to determine if an enrollee is eligible for benefits (74 O.S. §1369).
    o A mobile application for online enrollment accessible to employees and managers.
    o Communication to employees through email, push notifications, and SMS text.
    o Cost calculators (based on the employee's pay frequency) and plan comparison tools.
    o Ability to track the changes made in the system by employees, benefit coordinators, or flexible benefit representatives.
    o  Ability to reconcile data from 2 or more differing systems or databases including cloud sources on a schedule.
    o Ability to format and export to differing systems on a schedule.
    o Ability to upload documents to each employee.
    o Ability to produce reports on all types of activity on a weekly, monthly, quarterly, annual, and

ad hoc basis.  The system must produce reports for compliance with the Affordable Care Act. Report capability should be flexible enough to meet changing needs. OMES would like to see examples of reports the respondent can provide.

  o Tools for reconciling regulatory requirements of benefit choices. For example, certain employees may opt out of insurance coverage but it requires a signed form and proof of other insurance.

  o Automatic alerts for errors or when new data is loaded.

  o Alert reporting based on agency or carrier.

  o Tools for auditing and reconciling and related reports.

  o Ability to track premium payments made outside of payroll (employee is on leave without pay).

**Human Resources – Performance Management**

- All executive branch agencies are required to use the performance management system provided by OMES.  State law requires that the provided evaluation system "be used by all executive branch agencies for completing employee performance evaluations and making salary and performance-based pay decisions"  (O.S. 74 Section 840-4.17).

- The current performance evaluation system provides a form in a Word template.

- Administrative rules allow agencies to determine their own employee evaluation schedule as long as it is not more than twelve months.  The schedules being used include: state fiscal year, federal fiscal year, calendar year, and employee anniversary dates.

- Administrative rules require that the immediate supervisor conduct employee evaluations and meet with the employee for an initial planning discussion, a mid-year review, and a final evaluation where results and ratings are shared with the employee.

- Employees are rated on:

  o Up to eight accountabilities (task and performance standard) as determined by the supervisor and employee;

  o Five behaviors (supervisor can define what these mean in individual jobs):

    ▪ Customer service

    ▪ Teamwork

    ▪ Problem solving

    ▪ Use of time and leave

    ▪ Leadership (optional)

- Administrative Rules require that the supervisor identify performance strengths and performance areas for development.  All evaluations are expected to have a development plan for the next year even if no

improvement is needed in job performance.

**Human Resources – Compensation and Job Description Management**

- Agencies regularly request market data related to classified and unclassified jobs. Our current process utilizes the following market surveys: National Compensation Association of State Governments, Oklahoma Hospital Association, CompData Surveys, and Economic Research Institute Salary Assessor. The data for these surveys are separate and apart from one another requiring extra time and effort to compile and analyze the data in order to provide appropriate responses.

  - A survey management tool would be ideal to pull the market data points together in one place providing more consistent and timely benchmarks for agencies.

- Classified job descriptions are in separate Word files by job family. Unclassified jobs descriptions are controlled by each agency. Although multiple agencies may use the same job title, the job descriptions may be drastically different. A job description builder could assist agencies to create and maintain better, more consistent job descriptions for their unclassified jobs. OMES – HCM does not currently have access to unclassified job descriptions. Having more readily available access to agencies' unclassified job descriptions via a system would greatly assist in identifying job matches for benchmarking and capturing market data.

- Salary structure maintenance and management is currently administered via Excel. The tools used are rather limited.

- More robust compensation analytics would be beneficial to aid in making recommendations and provide more readily available data for leadership to make decisions. This would include, but is not limited to, linear regression, cost analysis, and compensation modeling.

**Human Resources – Onboarding**

- OMES receives frequent requests from leadership and agencies to modernize our onboarding systems to become paperless, and allow the employee to complete the information.

- OMES is looking for a solution that will:

  - Interface with applicant tracking system, and with the HCM module;

  - Provide electronic forms, that auto populate any redundant data into fields;

- o Assign new hires an online checklist of tasks with varying deadlines, customizable to the State's needs, and give notification to the new hire and HR upon completion of tasks or if any tasks are incomplete;

- o Provide new hire access prior to start date;

- o Provide access on mobile devices;

- o Incorporate background checks, benefits, and retirement enrollment;

- o Allow for an electronic review of policy including an acknowledgment signature;

- o Provide feedback check points to new hires (1 week, 30 days, 90 days, etc.) in cooperation with workforce planning;

- o Provide an automated assistant to guide new hires through more complex topics such as benefits and insurance;

- o Incorporate a welcome/educational video including mission, vision, values, "key players", and any other branding information.

**Human Resources – Workforce Planning**

- OMES – HCM is legislatively required (Title 74 O.S. Section 840-1.6A(17) to provide a workforce planning function to assist state agencies in analyzing the current workforce, determining future workforce needs, and implementing solutions so that agencies may accomplish their missions. To assist state agencies workforce planning provides employee engagement surveys, workforce data and analytics, and HR analytics as well as providing consultation and guidance related to organizational design, organization charting, and succession planning.

- State agency leadership, agency HR personnel, and agency personnel require succession planning resources and tools to manage succession plans, talent pools and talent review processes at a statewide level as well as at the agency level. Succession plans are needed for specific job families, individual roles and leadership levels as well as organizational levels, etc.  The succession planning resources and tools should manage internal personnel goals, development, employee progress, gaps, succession readiness, and risk assessment.

- State agency leadership, agency HR and/or designated personnel, and OMES-HCM personnel require HR analytic tools to assist in analyzing, interpreting and visualizing current personnel data (workforce demographics, diversity, turnover, retention, hire rates, performance, promotion rates, compensation,

etc.) as well as using personnel data to forecast and be predictive at an statewide level and agency level. Reports, charts and graphs need to be easily shared (web links, embedded web links, APIs, etc.), presented and downloaded.

- State agency leadership, agency HR and/or designated personnel, and OMES-HCM personnel require workforce analytic tools to aid state government in forecasting workforce risks, identifying critical gaps between current state of the workforce and future needs as well as measure results of HR programs.

- State agency leadership, agency HR and/or designated personnel, and OMES-HCM personnel require organizational charting tools to display real-time and dynamic visualizations of the organizational structure, organizational modeling and scenario planning as well as archived/point-in-time views of historic organizational charts.

- OMES-HCM personnel require an employee engagement system to administer employment surveys and reporting dashboards to all state employees. HCM personnel need to use the system to administer system functionality to OMES-HCM users as well as users at each state agency and to create employee focused surveys to assess, analyze, interpret, visualize and interpret employee feedback at various points within the employee lifecycle (recruitment, onboarding, engagement/climate, exit). HCM personnel will need to issue and analyze employee focused pulse surveys as well.

## Human Resources—Applicant Tracking

- The state currently uses JobAps for an online employment application, applicant tracking and certification system, test development and administration, and statistical analysis of tests based on applicant response data.

- Test development and administration means multiple-choice, job knowledge tests administered in a proctored environment. Applicant self-rated questionnaires are heavily used in the current system as well. Questionnaires are administered online as part of the application process. Invitations are sent by email for applicants who need to take a test (O.S. 74 Section 840-4.12).

- Central HR or hiring agencies can managing a self-scheduling feature for applicants to take a test or interview.

- HR staff can set up emails to be automatically sent to applicants upon reaching the next step in the hiring process or emails can be sent manually through the system. All emails sent to an applicant are viewable on the applicant's profile record by both HR staff and the applicant.

- The current system allows for automated screening of minimum qualifications.

- Applicants can sign-up online to be notified by email when vacancies of particular job titles are posted to the jobs board.

- Applicants can easily apply for a job by copying one of their previous applications with one click.

- Applicants can upload attachments to their application.

- The current system allows for centralized administration with each agency having access to their own certification lists, applications, and can report on their own data. Security roles are easy to create and modify.

- The current system allows for multiple application templates. OMES has one master template and can turn off sections of it to create different templates for different types of jobs.

- The current system provides for the statutory requirement of applying veteran's preference points. These can be 5 or 10 points added to the score, or 10 points added to the score and the veteran's name goes to the top of the list without regard to other scores that may be higher (O.S. 74 Section 840.4.14).

- The current system allows for the application option of the state's disability hiring program and integrates these applications which have no scores into the certificate along with other scored applications. The same feature also provides for our Priority Reemployment Consideration program for previous employees who were laid-off (O.S. 74 Section 840-4.12).

- The current system allows for certification of applicants based on matching their county of residence to the job location, followed by all other applicants in score order (O.S. 74 Section 840-4.13).

- We do not accept paper applications but we do allow paper testing in some areas of the state. The current system has a scannable answer sheet that can be uploaded into the system and all the data is available for reporting and analysis just as if the test had been taken online.

- Statistical analysis is available at the test, sub-test, and item level. There are multiple reporting options on applicant data, job announcement data, and test administration locations and scores.

- Question types available for use in questionnaires and tests include: multiple-choice, multiple-select (with varying scoring options), text, text area, yes or no, check box, no answer.

**Human Resources—Learning Management**
- The State of Oklahoma requires a statewide learning management program to track statutorily required training programs and credits.

- Currently, the state uses Oracle LEARN for tracking statewide and agency-specific training, reporting and certifications.

- Any LMS must be 508 and SCORM 1.2 compliant. This includes the following requirements for common areas of navigation:

  o Supports tabbed browsing within LMS system and within courses;

  o Supports JAWS screen-reader interaction;

  o Color-coding cannot be the only means of conveying information, indicating action, prompting response or distinguishing a visual element.

  o Text equivalents must be provided for non-text elements.

- We will require a system that provides for bulk management of users via the HRIS, the ability to categorize users into agency groups and allows for those groups to be independently managed by agency administrators.

- Enrollment should be self-service with flexible messaging options, reminders and other automation that reduce administrative burden on the training team.

- Our content must be organized by subject or topic and must be capable of being either viewable by all users or assigned to only select users by agency or other data element. We offer online self-paced, online instructor-led, blended and classroom training in addition to complex certification programs that rely on flexible asset organization, such as learning plans.

- Many courses require yearly certification so flexible recurring training options are a must.

- Supervisors and managers must have approval over enrollment and the ability to build development plans for their direct reports.

- OMES requires advanced reporting tools that provide access to learning data for multiple role levels within the system to allow agencies autonomy over their learning data.

- Webinar and live video support allows training to be broadcasted to rural areas of the state while still tracking attendance and completion.

- The system should be compatible with responsively designed online modules allows training to happen on any device from any location.

**Technical**

- The state is open to both software applications and third party provided services. This section

addresses technical requirements for software solutions.

- o The state prefers a hosted solution.
- o The solution must have role based security roles that can be defined.
    - Employee security roles;
    - Manager security roles;
    - Agency security roles (can only see their agency's data and not other agencies);
        - Some will have view only access.
    - Central staff  - can see data from a statewide perspective;
        - Some will have view only access while some will have update access (based on job responsibilities).
    - Shared services staff – contracts with other state agencies to perform HR or payroll functions.  These staff members require access to data for specific agencies (but not all agencies).
- o The system must be configurable according to business rules at both the statewide level and an agency level.
- o Some dropdowns (sets of values) are required at a statewide level and others are required at an agency level.
- o Workflow processes should have the ability to include ad-hoc approvers.
- o In some cases, the workflow would be assigned to a group – where the group would be notified that an action needs to be taken and one of the people in the group can go perform the action.
- o The solution should include the ability to standardize/validate addresses.
- o The solution should include clearly defined mapping of fields from PeopleSoft into the new system for conversion purposes.
- o The solution should include the ability for bulk downloads of data for agencies and central staff and mass uploads of data for mass pay increases, benefit changes, etc.
- o A flexible reporting platform that includes online security so that staff has restricted access for reporting is needed.
- o The ability to mask data for online viewing is necessary.  for example, only see last four digits of bank account or SSN.

**Section D.      RFI Response Instructions**

The State is asking all interested parties to submit a response containing the following information:

- A description of past experience providing similar services/products.

- A description of how your solution fulfills the requirements, and whether your solution fulfills only portions of the requirements or encompasses all aspects of this RFI.

- For each bullet point in the potential scope, indicate whether your solution will accommodate the current method or requirement and describe any change in business process that would be necessary, or that may be a better process.

- Your opinion, based on your past experience, on whether OMES has identified all the major components necessary to offer this service. If not, please provide information on other necessary components.

- A list of potential problems/risks that the State may encounter, and any ideas or suggestions about how such problems/risks should be addressed in a solicitation.

**Section E.      Demonstrations**

The State reserves the right to request demonstrations and clarifications from any or all respondents.