WESTCOP
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Westchester Community Opportunity Program
Payroll Provider RFP Presentations

The Westchester Community Opportunity Program, Inc., (WestCOP) a private not-for-profit, multi-purpose social services organization, having proudly operated community programs combating poverty and its adverse effects in the Hudson Valley for over 50 years.

Our Mission - To mobilize and efficiently manage resources through partnerships and collaborations to help the low-income and at-risk populations in the Hudson Valley region to achieve greater self-sufficiency.

For consideration, please provide us with a response to the questions outlined below:

Introduction & Organization Overview:

Provide a brief history of your company

- Company name and address
- Are you a public or private company?
- What is your primary business focus?
- Describe your target market
- How many years has the system you are offering been released?
- How many HRIS/Payroll clients do you have
- What is the average size of your customers?
- Who are your competitors and what sets you apart from them?
- Where are you positioned in the industry against your competitors?
- Are you solutions provided by one single provider or do you have multiple vendors your clients interact with to deliver end to end payroll, timekeeping and Ben admin functionality?

Technology-System Administration & Efficiencies

Describe the overall technical architecture of your system in 2-5 sentences.

- Describe your datacenter infrastructure, so we can understand resilience and performance.
- If your system is cloud based, tell us your primary cloud infrastructure provider.
- Is your system resilient to DDoS attacks and single site power outages, fires, floods?
- What is your support for legal discovery and legal hold of data?
- What supported integrations does your system have to other enterprise software systems?
- In an enterprise setting, how does your system support user creation and deletion.
- Does the system support directory synchronization, or other means of ensuring that new users are provisioned and departed users are removed appropriately?

- Describe if and how your system supports scheduled reporting and event-based reporting, including the formats and supported delivery modes.
- Can we create payrolls on demand?
- Manual checks on demand?
- What are the costs related to these one off, rush requests?
- Can we make last minute changes to payroll, timekeeping, ben admin functionality?
- How much technical assistance is required from the vendor?

Driving Efficiencies:

- What are some of the key tactics that your organization use to create greater efficiencies for your clients?
- What have been the most significant changes in your organization over the last 5 years?
- How has your organization leveraged technology to improve the customer experience?

Reporting & Process Mechanics:

- Does your solution deliver read only reports, if so, how many?
- Do you provide built in analytics, dashboards or reports on demand?
- Explain your ad hoc reporting and business intelligence output.
- How easy is the application to create unique reports?
- Provide a brief summary of how your system is structured and how it integrates with other system functions.

HUMAN RESOURCES:

Briefly describe your system's HR functionality.

- Is this system integrated with the payroll system?
- Was this application developed in-house or purchased?
- Describe the types of historical information your system maintains (including number of years maintained).
- How do you support electronic signatures? Describe the HR process for transferring an employee between departments and/or companies.
- Are there duplicate fields in both HR and Payroll that can be updated and modified? What is the timing? Describe how it works.
- Explain how a "re-hire" is identified and how previous history and years of service are recognized.
- Can electronic files and scanned documents be stored by associate on your system? What limitations, if any, exist?
- Describe the process to terminate an associate on the system.
- Describe how your system can trigger events beyond pay for terminated employees (e.g., remove system access, revoke access cards, etc.).
- Describe how a terminate action can be reversed on the system
- Can you explain how benefit administration is handled in your system?
- Do you include ACA reporting as a standard offering in your reporting package?

PAYROLL:

***Briefly describe your application's payroll functionality*.**

- Is this application integrated with the main HRIS application?
- Was this application developed in house or purchased?
- Explain how changes are tracked and viewed throughout the system.
- Describe the payroll process for transferring an associate between departments, companies, or states. Is this integrated with the HR function or is a separate process required?
- Describe tools/features available for employees to submit inquiries on their pay.

BENEFITS:

Describe the integration between benefits and payroll.

- How does your system handle benefits administration with a third party administrator?
- Explain how your system facilitates reporting to third party vendors such as benefit providers.
- Does the benefit data automatically populate in payroll? Is it real-time or a batch process?
- Does your system have a module to maintain Worker's Compensation Claims, Costs, tracking lost time, restrictions, legal reporting requirements, regular reporting, etc.? Does the system allow for tracking of all notes, conversations, etc.?
- Does the system allow for tracking of all notes, conversations, etc.?
- How do you support electronic signatures?
- How do you work with third party benefits brokers?

401(k)

Describe how your system exports 401(k) enrollment/change data to a ready-to-send file that can be transmitted to record keeper/trustee on a weekly basis or at initial enrollment.

- Describe how you manage 401(k) changes from third-party vendors.
- What types of information have you provided to third-party vendor regarding address changes, terminations, etc.?
- Explain how your system will enable us to handle associate loans against 401(k) plans, including repayment through payroll deductions.
- How will the system notify us that an associate has an unpaid loan balance at termination?
- Explain how your system handles maximum IRS allowable annual contributions. How is this maximum changed as IRS maximums change?
- Describe how your system calculates IRS maximum allowable contributions when participant chooses to contribute in both pre-tax and after-tax plans. Describe how calculations for "employer portions" are established and managed in the system. Pre-tax & after-tax?
- How are "catch up" contributions handled in your system?
- Describe how 401(k) contributions, sent to our record keeper/trustee, are reconciled.

RECRUITING AND APPLICANT MANAGEMENT

Provide a brief description of your recruiting and applicant management system.

- Describe your candidate pre-screening or qualification process?

- What job boards are supported with your product? Describe how jobs are posted to Internet job
- How is an applicant transitioned to an employee in your system?
- How does an applicant apply for a job online?

HIRING/ Onboarding

Describe your employer configurable new hire workflow.

- Please provide a brief overview of your onboarding solution.
- What are examples of the forms your solution supports that are typically completed by the hiring manager and/or new hire?
- Please provide examples of how your solution assists in conducting employment verification.
- Describe the system capabilities for online benefits enrollment (e.g., eligibility rules, tenure or grade level based premiums, plan dates).
- Describe how your self-service solution can be used to guide employees through benefits enrollment.
- What tools do you have available for benefit administrators to monitor and provide a smooth enrollment process for the company and its employees?
- Is workflow associated with benefit enrollment and life event changes?

LEAVE ADMINISTRATION

- How are leaves of absence identified and processed in the system? I.e. Personal Leave (PL) and Family and Medical leave Act (FMLA) Paid Family Leave (PFL)
- Explain how your system facilitates handling the provisions of the Family and Medical Leave Act (FMLA).
- Explain how you coordinate and manage FMLA with STD management. Describe in detail how the communication and workflow would operate.
- Describe how the system maintains leave of absence history records, time/hours used, including multiple leaves in a 12-month period so time off does not exceed maximum time allowed.
- Describe how your system monitors workers' compensation and the related leave of absence
- Describe the benefit premium collection process when associates are on leave without pay.
- How are leave associates notified about open enrollment and their benefit elections processed?

Paid Time off (PTO), Vacation, Personal Day, Sick

- Can employees request PTO?
- Describe how your system calculates accrued PTO. Can it handle multiple types of "time off" accounts (i.e. PTO, VAC, Sick, and Personal Days)?

Time & Attendance:

- How many options of T&A do you offer?
- What T&A option would you recommend?

POSITION MANAGEMENT:

- How are position statuses maintained in the system?
- What information associated with the employee is controlled by the position?
- What are the system rules for calculating FTE?
- Will the system enable us to track positions currently including those budgeted now, in the future, and in the past?

CUSTOMIZATION:

- Describe the delivered tools and methods required to customize your application. Can we perform these customizations or do you the vendor need to modify the system?
- Describe customer configuration vs. vendor customization for product.
- Can we customize the look and feel (e.g., logos and colors) in your application?
- How are customizations preserved during product updates?
- What is the effect of future upgrades on our customizations?
- Explain the ability to configure data entry screens and to create new inquiry screens.

IMPLEMENTATION:

Provide an overview of your process for effectively managing the implementation process?

- Please provide a brief explanation of the fees and costs associated with implementing and using your payroll system on an on-going basis.
- Provide an overview of the operational support structure (staff) & process (Help Ticket) your organization provides for reporting, tracking and resolving issues.
- How long is a typical product implementation?
- Describe the typical implementation project team. Who is the primary point of contact during implementation?
- Describe your approach to identifying, managing, mitigating, and tracking of project risks. Provide a sample risk mitigation plan.
- Describe your issues management approach and plan.
- During the implementation process, do your consultants assist with process improvement and/or best practices? Provide examples.
- How many employees from client are needed to support the project? What is your process for moving from implementation to customer maintenance?
- How long does implementation team stay with client before transferring to customer service?

KNOWLEDGE MANAGEMENT:

Provide an overview of your training programs and delivery methods.

- Is there a test database utilizing real data available for future new employee training?
- Where are your training facilities located?
- Is there a cost associated with training for customers during or after implementation? What ongoing customer training is available?
- What training materials do you provide?

CUSTOMER SERVICE/SUPPORT:

Provide an overview of your customer support and maintenance services.

- What is the cost of your annual maintenance plan?
- Do you use your Web site as a mechanism to provide support to your clients? How is the Internet part of your support strategy? Please explain.
- What is the experience level of your service and support staff? What is the average length of service in your support area? How does your firm educate and train your service and support staff?
- What technologies do you take advantage of to run your support organization?
- What hours does your company provide service and support?
- How many support centers do you have and where are they located?
- Is there weekend or after hour support?
- Is there an after-hours emergency contact number if needed? Is there a charge for this service?
- How often do you release new versions of your software?
- Do you have any user groups (regional or national)?
- Do we get change information prior to release?
- What is the test process for new versions?
- How do you determine and prioritize changes in your system?

Cost & Operational Support:

Provide a brief explanation of the fees and costs associated with implementing and using your payroll system on an on-going basis.

- Provide an overview of the operational support structure (staff) & process (Help Ticket) your organization provides for reporting, tracking and resolving issues.

Customer Experience:

- Describe the End-User experience in your system?
- How has your organization leveraged employee self-service?
- What tactics does your organization utilize to drive cost savings for your clients?
- What do you identify as the most insightful key measures for payroll administration and why?

Pricing:

Please provide your costs for the below:

- Employee Count 550:
- Payroll Frequency Bi-Weekly:
- To include products: Applicant Tracking; Onboarding and Document Management; Position Management; Personnel Action Forms; Time and Attendance; Paid Time Off Requests; Benefits Administration; Custom 401k; Payroll; Reporting

Wrap Up:

What do you believe is the key reason we should select your company to be our payroll partner?