Addendum 1:
Responses to Questions received for Human Resource Management Information System
RFP 370-800-17-002
July 29, 2016

1. Please clarify whether ISTO is looking for the new system to be the HR system of record for employee information, or will the employee master information be retained elsewhere.

    The Treasurer is looking for a new Human Resources Information System ("HRIS") to house all of this information.

2. Please confirm whether the system needs to have a Leave Case Management tool.

    The HRIS system needs a tool – whether "Leave Case Management" or otherwise – to record and track to Family and Medical Leave Act (FMLA) leave and other types of leaves of absences.

3. Under Evaluation System, please describe what is meant by "completed evaluation". Is this referring to employee performance evaluations?

    "Completed evaluation" refers to employee performance evaluations.

4. Does ISTO need the new system to calculate union dues deductions, or just post that information into the new system?

    The Treasurer needs the new system to post union dues deductions. It is not necessary for the system to calculate union dues deductions, as these deductions are calculated by the specific union itself and the Treasurer's office just enters that number.

5. Does ISTO need the new system to calculate all other payroll deductions, including FICA, medical, etc.?

    No.

6. Please provide clarification for the fiscal forecasting functionality. What is the formula that is mentioned? Is this need for job or functional costing?

    The formula is a variable based calculation that associates each employee to an appropriate funding source based on job functions.   The HRIS system should include functionality to allocate payroll to different funding sources.

7. Describe the requirement for Field Reports.

   The Treasurer's current timekeeping system requires employees to file a field report when an employee is working at event or attending a meeting outside of the office (*i.e.*, working in the field). Employees tracks their time outside of the office by using this report. If there is an option in the new HRIS system whereby an employee can log-in remotely instead, we are open to that feature; however, employees need to account for their time on the clock and indicate whether they are working in or outside the office.

8. Describe the requirement for quarterly and annual Department of Human Rights reporting.

   The Department of Human Rights' quarterly reports require the Treasurer to convey employee information such as: race, sex, EEO classification, transactional data such as hiring, firing, etc., and staff location.

9. Describe the data that needs to be converted / retained from the existing system.

   The data that needs to be converted and/or retained from the existing system includes, but is not limited to:

   - **Employee data (*e.g.*, name, address, private information, employment history, background check information, union payroll deductions, shift differential) (Please refer to pages 7-8 of the RFP.)**
   - **Timesheet data (*e.g.*, hours worked, start time, end time, approval, audit logs)**
   - **Employee evaluation and performance management data**
   - **Employee benefit time information**
   - **Employee evaluation information**
   - **Historical audit logs**
   - **Employee Flex time logs**
   - **FMLA information**

10. What is the purpose of integration with SharePoint? What information is / will be held in SharePoint?

    The SharePoint application should provide hyperlinks to HRIS applications. Treasurer's office employees should be able to click on the hyperlink which should open the HRIS application.

11. Requirement: Enter "field reports" and then send a confirmation of the report entry to both the employee and the supervisor. Could you provide more detail regarding the nature of a 'field report'? For example, is the requirement to attach a Word or Excel document and then provide appropriate access to it? Is access to be restricted to only the employee and supervisor, or should an HR Administrator also be able to access it?

The Treasurer's current timekeeping system requires employees to file a field report when an employee is working at event or attending a meeting outside of the office (*i.e.*, working in the field). Employees tracks their time outside of the office by using this report; the field report is not an attached Word or Excel document - it is entered directly into the system. If there is an option in the new HRIS system whereby an employee can log-in remotely instead, we are open to that feature; however, employees need to account for their time on the clock and indicate whether they are working in or outside the office. Employees, supervisors and HR staff should have access to these reports.

12. Requirement: Union/payroll deductions
    •   Allow for entry of union membership
    •   Allow for tracking of dues amount, payment date and set-up reoccurring deductions
    •   Allow for the tracking of other reoccurring deductions such as medical, FICA, etc.
    These stated requirements can increase scope to a varying degree depending on how they are approached. Whether this need is for only Union employees or the general population, enrollment in medical plans to determine a payroll deduction is typically a Benefits function within an HRIS. The implication of configuring Benefits adds significant scope (and usually is accompanied by self-service aspects of benefit enrollment). FICA is typically a calculation within a Payroll system and therefore is a by-product of implementing a Payroll system. These requirements, at a minimum, leads to configuring Benefits and a Payroll Interface. A Payroll Interface appears to be a consideration in the RFP, but not a definite requirement. Therefore, can you comment on how critical are the requirements and the relative need for the individual components?

    The aforementioned requirements are not likely critical for purposes of this particular RFP, but they are preferred if a potential bidder can offer solutions on how to achieve the above-described interfacing of the benefits and payroll systems.

13. We read on page 9 the reference to the types of users for a new system. However, can you provide a total employee count of Office of the Illinois State Treasurer if that count is different from the listed information on page 9?

    The total office-wide headcount (including pilot groups) is 180 to 200 employees.

14. Whether companies from Outside USA can apply for this? (like, from India or Canada)

    Companies based outside of the United States may bid on this procurement; however, contract award is subject to the company's ability to lawfully conduct business in the United States and within the State of Illinois.

15. Whether we need to come over there for meetings?

       Yes, as necessary.

16. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

       Yes; however, see the Treasurer's response to Question #14 above.

17. Can we submit the proposals via email?

       No.