TOWN OF WINDSOR LOCKS

REQUEST FOR PROPOSALS
Payroll Solutions and Services

March 20, 2020

The Town of Windsor Locks will be accepting proposals from qualified organizations providing comprehensive payroll solutions.

Interested firms should obtain the complete Request for Proposal (RFP) and related information from the Town’s website at www.windsorlocksct.org/finance/finance-department. Any addenda will be posted to the same website. It is the responsibility of interested firms to check the website during the RFP process.

The Town of Windsor Locks reserves the right to accept or reject any and all proposals, or any part thereof, if it is in the best interest of the Town.

Proposals must be submitted to the First Selectman’s office no later than Monday, April 13, 2020 at 12:00 pm. LATE PROPOSALS WILL NOT BE CONSIDERED.

The selected firm must meet all Municipal, State, and Federal affirmative action and equal employment opportunity practices. The Town of Windsor Locks is an Affirmative Action/Equal Opportunity Employer. Minority/Women/Disadvantaged Business Enterprises are encouraged to submit a proposal.
TABLE OF CONTENTS

Legal Notice ........................................................................................................................................... 2

I. General Information
   A. Introduction ................................................................................................................................. 3
   B. Description of Government ........................................................................................................ 3
   C. Minimum Requirements ............................................................................................................. 3
   D. Evaluation Criteria ...................................................................................................................... 4
   E. Selection Process ....................................................................................................................... 4
   F. Terms of Engagement .................................................................................................................. 4

II. Required Services
   A. Payroll Services ......................................................................................................................... 4
   B. Benefit Management ................................................................................................................ 6
   C. Employee Management ............................................................................................................. 6
   D. Document Management ........................................................................................................... 6
   E. Employee Self Service ............................................................................................................... 7
   F. Training and Ongoing Support ................................................................................................. 7
   G. Insurance ................................................................................................................................... 7
   H. Indemnification ......................................................................................................................... 8
   I. Non-Discrimination .................................................................................................................... 8

III. Further Information
    ...................................................................................................................................................... 9

IV. Submission of Proposal
    A. Proposal Instructions ................................................................................................................. 9
    B. Proposed Calendar ................................................................................................................... 11

Attachment A: Format for Cost Proposal ..................................................................................... 12
Attachment B: Non Collusive Affidavit of Proposer .................................................................... 14
Attachment C: Demonstration Requirements ............................................................................. 15
LEGAL NOTICE

The Town of Windsor Locks is requesting proposals from qualified organizations providing payroll solutions. Proposals will be received at the First Selectman’s Office, 50 Church Street, Windsor Locks, CT until 12:00PM on Monday, April 13, 2020. Request for Proposal documents and specifications can be downloaded from the Finance page of the Town of Windsor Locks website at www.windsorlocksct.org/finance/finance-department or may be obtained from the Finance Office during Town Hall operating hours.
Please note this RFP is being released with expectations of continued business as usual. We understand with the rapidly evolving COVID-19 pandemic there may be a requirement to change the calendar and deadlines. We hope to fulfill any meetings through the use of technology, rather than in person. We are releasing this request as originally designed and will post any amendments to the finance page of the town website as needed.

I. GENERAL INFORMATION

A. Introduction

The Town of Windsor Locks (“Town”) is requesting proposals from qualified organizations providing a full range of services related to payroll processing, tax filing, and remittance and data interface services to third party vendors and systems (herein referred to as “Respondent”). The Town desires to utilize a web based comprehensive payroll and related services solution. The chosen solution will have modules or solutions for Time and Attendance, Compensated Accruals, Employee Self Service, Benefits Administration, and Document Management. The solution will be utilized by Town employees who will handle day-to-day administration and maintenance of these tasks.

B. Description of Government

General
The Town of Windsor Locks employs a combination of FLSA exempt/non-exempt, full time, part time, and seasonal employees. The Town operates on a fiscal year of 7/1 to 6/30.

Relevant payroll data:
- Weekly payroll, paid on Thursdays
- Approximately 90 full time employees
- Approximately 150 employees paid each week
- Additional employees include annual and monthly stipends
- 367 W2 issued for 2019
- Some employees do not participate in Social Security
- 4 collective bargaining agreements, and a non-unionized group of employees
- Deductions in addition to taxes include garnishments, health, dental, pension, 457B, union dues, and other voluntary plans such as disability, life insurance, and HSA contributions
- Currently use ADP to process payroll

C. Minimum Requirements

To be considered, Respondents must satisfy the following requirements.
- Be able to demonstrate a proven track record of successfully and reliably providing similar payroll solutions and services to other governmental entities
- Provide references of at least 2 other governmental entities that the Respondent currently or previously provided payroll services to, preferably in the state of Connecticut
- Have sufficient training and implementation staff in order to have a successful 7/1/2020 go-live
- Are not involved in any adverse claims against the Town and are not delinquent in any financial obligation to the Town
- Able to meet the request of items listed in II. Require Services
D. Evaluation Criteria

The Respondent will be evaluated by the selection committee on the following items.

- The firm must meet the minimum requirements listed above
- The comprehensiveness of the solution offered
- The design of the implementation and timeline is effective and responsive to the Town’s needs
- Reasonableness of cost of the solution, both on an annual basis, and for one-time implementation costs

E. Selection Process

Submitted proposals will be evaluated by a Selection Committee consisting of finance staff, human resources staff, and some department leadership. During the evaluation process, the Selection Committee will, at their discretion, request any one or all Respondents to present demonstrations of the solution being offered. Such presentations will provide Respondents an opportunity to answer any questions the selection personnel may have on a Respondent’s proposal. Not all Respondents may be asked to make such oral presentations. Oral presentations are tentatively scheduled for the week of April 20, 2020.

Based on the results of the proposal review process and presentations, the selection committee will recommend a solution for approval by the Board of Selectman.

It is anticipated that the selection of a firm will be completed by May 5, 2020. Following the notification of the selected firm it is expected a contract will be executed immediately following.

F. Terms of Engagement

The selected Respondent will be expected to have all staff trained, and all software configurations made for a 7/1/20 go live. This should include an adequate time allowance for testing of all data once loaded. A three-year contract will be awarded with the option of the Town to renew for additional years, subject to an annual review and satisfactory negotiation of terms including a price acceptable to both the Town and the Respondent, and subject to the annual availability of an appropriation.

For the purposes of the engagement or agreement, the Respondent will be an independent contractor, and no employment relationship exists between the parties.

II. REQUIRED SERVICES

A. Payroll Services

Time and Attendance:

- Ability to have multiple pay rules per department, allowing for different contractual time keeping requirements such as Call-In minimum hours, Overtime, Double-time, holidays, etc.
- Ability to have employees select different departments or codes when clocking in, or to switch roles/jobs
- Ability to restrict available pay codes depending on department or union
• Ability to handle unique schedule rotations, including 24 hour coverage for public safety
• Ability to calculate and accurately apply differentials not affecting base pay, such as stipends, shift differentials, and extra duty
• Ability to recognize the correct rate of pay depending on day of the week, holiday, shift, or number of hours working in a day or week
• Employee self-service access to request benefit time, review and approve their time card
• Supervisor access to review and approve timecards and leave requests
• Supervisor access to override or change pay codes, add time, or comments
• Audit tracking of all changes made by time, date, and username
• Calculates time to quarter hour increments
• Historical schedules, punches, comments can be viewed without time limit restriction
• Ability to allocate pay and/or hours of an employee to two or more departments
• Ability to accept employee punching through both timeclocks and web based log-in
• Error reporting (missing punches)
• Flagging for pre-determined parameters (long shift, short shift, early/late punch)

Compensated Leave Accrual Tracking:
• Must be able to accurately compute accruals and award time for Vacation, Personal, Sick, and Holiday
• Must be able to accurately compute accruals and award time on a monthly or annual basis, related to both anniversary and fiscal year
• Accrual calculations vary between and within employee groups

Payroll Processing:
• The payroll system must accurately and timely process weekly payrolls based on timeframe to be determined by the Town
• Flexibility of one-day processing to accommodate holiday schedule
• Ability to process a combination of payment methods including direct deposit and paper checks
• Payroll company must manage deduction and payment of garnishments, State and Federal Taxes, Social Security, and Medicare liabilities
• Payroll company must accurately prepare and file quarterly 941
• Payroll company must issue employee W2 in compliance with federal requirements
• Payroll company must file employer portion of W2 reporting in compliance with federal requirements
• Payroll company must have optional approval hierarchy in place to allow the Town to review and approve statutory reporting before being released, if enabled
• Ability to run checks outside the regular payroll schedule for payroll corrections and terminations
• Ability to make one time, recurring, or finite term deductions

Reporting:
• Combination of pre-made and on-demand reports
• Creation of on-demand reporting must be simple and intuitive
• Weekly report of earnings sortable by labor department, pay code, employee, or other characteristics
• Weekly reports of leave use and balance for each employee every week
• Summary and detail reports for leave, earnings, deductions
• Weekly audit trail of changes to any employee record since previous payroll run
• All reports must be available in excel format
• Payroll interface to Town’s general ledger system, Tyler Infinite Visions to provide accurate posting of all payroll data
• 52 week wage statement by date selected (Workers Comp reporting)
• Ability to run reports for flexible date ranges, including spanning calendar years

B. Benefit Management

Enrollment:
• Ability for employees to make changes to benefit enrollment status during open enrollment
  o For changes requiring documentation, review of documents will be done by Town designee
  o Sign off of review to be documented in benefit management system
• Ability for new hires/ newly eligible employees to make benefit selections during eligibility window
  o For changes requiring documentation, review of documents will be done by Town designee
  o Sign off of review to be documented in benefit management system
• Qualifying event changes are made by Town designee
  o Sign off of review to be documented in benefit management system
• Automated deduction payments when employee is enrolled in a plan

Reporting:
• All required ACA reporting including 1095 and 1094 reporting
• Reports by deduction code for reporting with remittance to voluntary plans
• Pension reports
• Customizable reports for census, billing, summary of benefits, etc.

C. Employee Management

Multi-Level Access:
• Allow for sensitive fields to be masked (DOB, SSN) and revealed depending on level of management/security
• Allow for read only access depending on level of management/security
• Allow for access or restriction to employee data in modules depending on level of management/security

Personnel Management:
• Scheduled notifications of events, such as anniversaries, leave expiration, enrollment deadlines, step increases

Personnel Changes:
• Audit trail by date, time, username of all changes made
• Historical data saved and able to be displayed and exported
• Ability to mass update multiple records at once

Security:
• Alert/notification if changes are made in certain areas
• Data archiving capabilities for inactive/terminated employees

D. Document Management
• Ability to upload documents as support for employee changes
• Ability to host documents for employees to reference such as policies and handbooks

E. Employee Self-Service
• Management of employee’s own personal information
  o Submit change of address and other personal contact information, emergency contacts, etc.
  o Submit changes for payroll, including direct deposit amounts, voluntary deduction amounts
• Ability to view paystubs and W2s
• Access to policies and handbooks

F. Training and Ongoing Support
Training:
• On site implementation training for front line users
  o Training for managers and staff responsible for time card review and approval
  o Training for HR and Finance Department staff on management and use of software
  o Training for staff on using electronic time cards, requesting benefit time
• Consistent training team for full length of implementation
• Clear, concise step by step instructions for basic functions for new hires (creating account, logging in, entering time, etc.)

Support:
• Dedicated support contact for Town account, designated backup
• Support hours that match east coast business hours
• Online help screens for processes
• User tools for employees, manager, and HR staff
• Ability to provide for disaster recovery, both for vendor site and Town
• The Town owns all data. The Town will be provided a searchable copy of all data if services are terminated

G. Insurance

If a contract is reached with a respondent, said Respondent shall, at its own expense and cost, obtain and keep in force during the entire duration of the engagement the following insurance coverage covering the Respondent and all of its agents, employees and sub-contractors and other providers of services and shall name the Town of Windsor Locks, their employees and agents, as an Additional Insured on a primary and non-contributory basis to the Respondent’s Commercial General Liability policies. These requirements shall be clearly stated in the remarks section on the Respondent’s Certificate of Insurance. Insurance shall be written with insurance carriers approved in the State of Connecticut and with a minimum Best’s Rating of A-VIII with all policies written on an occurrence form basis. In addition, all carriers are subject to approval by the Town. Minimum Limits and requirements are stated below:

Workers’ Compensation Insurance:
• Statutory Coverage
• Employer’s Liability
• $1,000,000 each accident
• A waiver of subrogation shall be provided in favor of the Town and its employees and agents
Commercial General Liability:
- Including premises and operations, products and completed operations, personal and advertising injury, contractual liability and independent contractors
- Limits of liability for bodily injury and building damage
- Each occurrence $1,000,000
- A waiver of subrogation shall be provided in favor of the Town and its employees and agents

Error and Omission Liability or Professional Services Liability Policy
- Provide errors and omission liability or professional services liability policy for a minimum limit of liability $1,000,000 each occurrence or per claim. The awarded Respondent will be responsible to provide written notice to the owner 30 days prior to cancellation of any insurance policy
- The Respondent agrees to maintain continuous professional liability coverage for the entire duration of the engagement, and shall provide for an extended reporting period in which to report claims for seven years following the conclusion of the project.

The Respondent shall provide a Certificate of Insurance as evidence of General Liability, statutory Worker's Compensation and Employer's Liability and Professional Services Liability coverage.

The Respondent shall direct its Insurer to provide a Certificate of Insurance to the Town before any work is performed. The awarded respondent will be responsible to provide written notice to the Owner 30 days prior to cancellation or non-renewal of any insurance policy. The Certificate shall evidence all required coverages including the Additional Insured on the General Liability and Waiver of Subrogation on the General Liability and Workers Compensation policies. The Respondent shall provide the Town copies of any such insurance policies upon request.

H. Indemnification

To the fullest extent permitted by law, the Respondent shall indemnify and hold harmless the Town, and its consultants, agents, and employees from and against all claims, damages, losses and expenses, direct, indirect or consequential (including but not limited to fees and charges of engineers, attorneys and other professionals and court and arbitration costs) to the extent arising out of or resulting from the performance of the Respondent’s work, provided that such claim, damage, loss or expense is caused in whole or in part by any negligent act or omission by the Respondent, or breach of its obligations herein or by any person or organization directly or indirectly employed or engaged by the Respondent to perform or furnish either of the services, or anyone for whose acts the Respondent may be liable.

The above insurance requirements are the Town’s general requirements. Insurance requirements with the awarded Respondent are subject to final negotiations.

I. Non-Discrimination

No person shall be denied or subjected to discrimination on account of any services, or activities made possible by or resulting from this agreement on the grounds of sex, race, color, creed, national origin, age (except minimum age and retirement provision), marital status or the presence of any sensory, mental or physical handicap. Any violation of this provision shall be considered a violation of a material provision of this agreement and shall be grounds for
cancellation, termination or suspension in whole or in part of the agreement by the Town of Windsor Locks and may result in ineligibility for further Town of Windsor Locks contracts. The Respondent shall at all times in the proposal and contract process comply with all applicable Town of Windsor Locks, state, and federal anti-discrimination laws, rules, regulations and requirements thereof.

III. FURTHER INFORMATION

• Please provide an overview of the training process
• Please describe how the reconciliation is completed for the gap between when data is loaded from the legacy system until go live
• Please describe how the extraction of information is handled from the legacy system
• Please describe what security measures are utilized by your company to ensure protection of all employee data
  o Please describe your disaster recovery plan, for both the Town site and your site
  o Please describe how a security breach is handled, and what party holds the liability
  o Please disclose if you have had a security breach, and to what extent
• Please advise if there are regular user group meetings, and if they are held at a local level
• Please describe your usual timeline and process for rolling out significant and minor software upgrades and updates
• Please describe how significant legislative changes that impact the payroll or reporting process are trained, including any additional costs (example: ACA reporting changes)
• Please describe what new hire training is available to staff hired post implementation, including any costs
• Please describe what choices the Town has in terms of payments/check clearing
• Please describe billings for services processed

IV. SUBMISSION OF PROPOSAL

A. Proposal Instructions

All questions regarding this Request for Proposal shall be emailed to the Finance Director at finance@wlocks.com. Questions will be accepted up until Monday March 30, 2020 at 6:00 pm.

All questions, and subsequent answers will be posted on the Finance page of the Town of Windsor Locks website at www.windsorlocksct.org/finance/finance-department on Wednesday, April 1, 2020.

This request for proposal does not commit the Town of Windsor Locks to award a contract or to pay any costs incurred in the preparation of a proposal to this request. All proposals submitted in response to this Request for Proposal become the property of the Town of Windsor Locks. Submission of a proposal indicates acceptance by the Respondent of the conditions contained in this Request for Proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the Town and the Respondent selected. The Town of Windsor Locks reserves the right to accept or reject any or all proposals or parts thereof for any reason as a result of this request, to negotiate with the selected Respondent, the right to extend the contract for an additional period, or to cancel in part or in its entirety the request for proposals, and to waive any informality if it is in the best interests of the Town to do so.
By submitting a proposal, you represent that you have thoroughly examined and become familiar with the scope of services outlined in this RFP and you are capable of performing the work to achieve the Town’s objectives.

Please submit 1 clearly marked original and 5 physical copies of the proposal. Additionally, please provide an electronic copy of the Respondent’s full response.

All proposals shall be received at the address listed below, no later than Monday, April 13, 2020 at 12:00 pm. Any responses received after the deadline will not be considered.

First Selectman’s Office – RFP Response
Town of Windsor Locks
50 Church Street
Windsor Locks, CT 06096

All respondents are required to submit the information detailed below. Please ensure that responses are organized and presented in the order listed below to assist the town in reviewing and evaluation proposals.

1. **Title Page**- including the company’s full and legal name, any DBA name, along with the name, address and telephone number of the contact person for the proposal at the company.
2. **Table of Contents**- to include clear identification of the material provided by section.
3. **Transmittal letter**- indicating the Respondent’s interest in providing the service, the Respondent’s understanding of the work to be completed and any other information that would assist the Town in making a selection. The letter should be signed by a person legally authorized to bind the company to a contract.
4. **Minimum Qualifications**- the proposal shall state that the Respondent meets the minimum requirements listed in section I, item C with any additional information needed to demonstrate compliance.
5. **Experience and Qualifications**- the proposal shall identify the principal supervisory and/or management staff who would be assigned to the implementation process.
   a. If any subparts of the implementation shall be handled by a different department or individual (example: accrual data conversion, creation of time and attendance rules, data exporting/importing) it should be disclosed. If different pieces of the onboarding will be handled by specialty departments, please list direct contact information for a single person that will coordinate efforts of that segment.
   b. Please list the individual who is to oversee the entire onboarding and his or her qualifications.
   c. The proposal should also describe the transition process for movement from implementation team to the normal, ongoing support staff.
   d. Please list the individual who will be responsible for day to day contact once the transition from implementation has been made.
6. **Proposed Work Plan and Timeline**- the proposal should describe the service delivery including staffing requirements of the Town and Respondent, breakdown of estimated hours, days, or weeks for each segment of the implementation, and estimated dates of completed segments. Please list out suggested length of time for implementation of each phase. List standard communications to be expected such as commencement and ongoing meetings.
progress updates, or other reports. Details should be provided regarding service coordination and monitoring procedures.

7. **Training**- The proposal shall list out all required, suggested, or optional training for implementation
   a. Training descriptions should include which module will be used, and recommended staff to attend each training and duration for each training
   b. Explain exactly how different trainings will be completed: pre-recorded, live face-to-face, web based, group, individual, or any other relevant information.
   c. List any requirements for training; space, technology, time, etc.

8. **Further Information**- Please provide responses to questions listed in III Further Information

9. **Other Considerations**- the proposal should identify any exceptions taken to this Request for Proposal. Any exceptions must be clearly noted as such and attached to the proposal.

10. **Pricing**- See Attachment A for pricing format.

11. **Attachment B**- executed Non Collusive Affidavit of Proposer.

**B. Proposal Calendar**

Below is a calendar for pertinent dates in the Request for Proposal timeline. Any revisions to the calendar below will be updated and posted to the Board of Finance page of the Town of Windsor Locks website.

- Request for Proposal issued: Friday, March 20, 2020
- Questions due to finance office: Monday, March 30, 2020 6:00 pm
- Questions and corresponding answers
- Posted to the Town website: Wednesday April 1, 2020
- Proposals due: Monday, April 13, 2020, 12:00 pm
- Selection Committee meets: week of April 13, 2020
- Oral presentations, if requested: April 22-29, 2020
- Final selection made: May 5, 2020
- Contract execution: immediately following selection
ATTACHMENT A
FORMAT FOR COST PROPOSAL

Fixed Fees:
Below is a fee structure chart that should be completed and submitted with response.
For ease of comparison, we ask that each Respondent uses the same format and the same number of
employees, specified for each group.
Please note if there is a flat fee, a per-employee fee, or both by breaking out the amounts on each line.
(For example, if the Time and Attendance module has a monthly fee, plus a per-user fee, break out both
costs on the respective line. If the fee is based solely on a flat fee or a per-user fee, enter 0 in the opposite
field)
Please list all costs as annual costs. (In the Per-Employee Fee, for example, if the weekly fee is $3.00 per
employee, the cost listed should be the calculated sum of $3 x number of employees specified x 52
weeks)

<table>
<thead>
<tr>
<th>Service</th>
<th>FY 2021</th>
<th>FY 2022</th>
<th>FY 2023</th>
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<tbody>
<tr>
<td><strong>Basic Payroll Processing:</strong></td>
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<tr>
<td>Base/Flat Fee, annualized:</td>
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<td>Per-Employee Fee: (use 153)</td>
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<td><strong>Time and Attendance:</strong></td>
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<td>Base/Flat Fee, annualized:</td>
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<td>Per-Employee Fee: (use 35)</td>
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<td><strong>Benefit Module:</strong></td>
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<td>Base/Flat Fee, annualized:</td>
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<td>Per-Employee Fee: (use 180)</td>
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<td><strong>Employee Self Service:</strong></td>
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<td>Base/Flat Fee, annualized:</td>
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<td>Per-Employee Fee: (use 370)</td>
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<td><strong>Document Management:</strong></td>
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<td>Base/Flat Fee, annualized:</td>
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<td>Per-Employee Fee: (use 370)</td>
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<tr>
<td><strong>Training and Support:</strong></td>
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<tr>
<td>Implementation Training:</td>
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<tr>
<td>Ongoing annual support:</td>
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</table>
**Issuance/filing of W2:**
Base/Flat Fee, annualized: __________ __________ __________

Per-Employee Fee: (use 375) __________ __________ __________

**Issuance/filing of 1094/1095:**
Base/Flat Fee, annualized: __________ __________ __________

Per-Employee Fee: (use 200) __________ __________ __________

**Equipment Charges:**
(List specific equipment) __________ __________ __________

**Additional Processing Charges:**
(List any and all specific charges. Do not include in total cost below)
Void checks __________ __________ __________
Special check runs __________ __________ __________
Prior period adjustments __________ __________ __________

Total annualized cost: $_________ $_________ $_________
ATTACHMENT B
NON COLLUSIVE AFFIDAVIT OF PROPOSER

The undersigned proposer, having fully informed themselves regarding the accuracy of the statements made herein certifies that;

(1) The proposer developed the bid independently and submitted it without collusion with, and without any agreement, understanding, or planned common course of action with any other entity designed to limit independent bidding or competition, and
(2) The proposer, its employees and agents have not communicated the contents of the bid to any person not an employee or agent of the proposer and will not communicate the proposal to any such person prior to the official opening of the proposal.

The undersigned proposer further certifies that this statement is executed for the purpose of inducing the Town of Windsor Locks to consider the proposal and make an award in accordance therewith.

______________________________________________________________
Legal Name of Firm                                               Business Address

____________________________________
Signature                                                      Date

______________________________________________________________
Printed Name of Signer                                          Title of Signer

Subscribed and sworn to me this ______day of _________________, 2020.

Notary Public
My Commission Expires on:

______________________________________________________________
ATTACHMENT C
DEMONSTRATION REQUIREMENTS

Please note this is a preliminary list of items that will need to be demonstrated. A finalized list will be provided to the Respondent when scheduling a time for a demonstration.

If requested to make a demonstration for the selection committee of the proposed solution, you will be expected to demonstrate the following items:

Payroll Services:
1. Show how a manager/clerk would log in to review timecards of his/her department
   a. Show how a manager/clerk can review punches on a daily basis
   b. Show how a manager/clerk can add punches
   c. Show how a manager/clerk can add comments
   d. Show a Sunday shift auto calculating at double time
   e. Show a shift over 8 hours auto calculating at straight time for the first 8 hours and overtime for the remainder of the shift
   f. Show how a manager/clerk can change a cost center for specified hours
   g. Show how a manager can approve requested time off
   h. Show how a manager/clerk can add paid time, such as sick, vacation
   i. Show how a manager/clerk can approve timecards for the department
   j. Show the audit trail for all above transactions
   k. Show the ability to review punches from 12 months ago
2. Show the tracking screen for accrued time: vacation, personal, sick, holiday
   a. Show which field designates which accrual rates are used
   b. Show how the payroll clerk can review a history of what has been awarded and used
   c. Show how the payroll clerk can make a manual adjustment to an employee’s time
      i. Show the audit trail of this adjustment
3. Show how the payroll clerk can make manual adjustments to an employee pay statement (for prior period adjustment)
4. Show the steps the payroll clerk will use each week to submit payroll including, if applicable:
   a. Show departmental batch imports
   b. Show a manual entry batch
   c. Show any checks run for errors such as missed punches
   d. Show any checks that can be run for items outside pre-set parameters (long shifts, short shifts, shifts outside normal schedule)
   e. Show reports that are run for a pre-check of all employee payroll items
   f. Show steps to finalize and submit payroll
   g. Show reports that are run after payroll submittal
   h. Show internal controls from payroll release to next day reports
5. Show quarterly 941 reports
6. Show reports for garnishments
7. Show the review process for reviewing W2s before releasing/finalizing them
8. Show how a check is issued outside the payroll cycle (for termination or correction of pay)
9. Show the reporting capabilities
   a. Show universal pre-made reports
   b. Show how to edit a pre-made report to add or remove information
   c. Show how to create a report from scratch
d. Show a 52 week wage statement report by a selected date (Workers Comp reporting)
e. Run a report by fiscal year, 7/1 to 6/30

Benefit Management:
1. Show what an employee would see during open enrollment
2. Show process the payroll clerk would follow for enrolling a new hire, or employee newly eligible due to Qualifying Event or employment status change
3. Show how the Payroll clerk updates rates for different plans
4. Show reports specific to benefit management or benefit deductions

Employee Management:
1. Show the process the payroll clerk will follow to add a newly hired employee
2. Show the process for changing an employee’s job title
3. Show an example of a tracking reminder, such as a 6 month step increase
4. Show how the payroll clerk will set up an employee’s schedule
5. Show a mass update of multiple employee files
6. Show a change in status that triggers benefit eligibility (part time to full time)
7. Show the process the payroll clerk will follow to terminate an employee
8. Show the audit trail of the above changes made
9. Show reports for any personnel changes made between each pay period

Document Management:
1. Show the areas where documents can be uploaded for support to transactions
2. Show areas where documents can be uploaded for employees to view
3. Show where employment forms can be uploaded, such as tax withholding forms, I-9, sign off/release forms
4. Show reports that can be run to show which employees have document attachments to their employment records

Employee Self Service:
1. Show the screens for the punch clock
   a. Show what an employee sees when s/he arrive at a punch clock
   b. Show how an employee utilizes a department or job transfer
   c. Show how an employee reviews his/her punches and timecard
   d. Show how an employee approves his/her timecard, and submits to the supervisor
2. Show the login process for employees who use web-based punching
   a. Show how an employee utilizes a department or job transfer
   b. Show how an employee reviews his/her punches and timecard
   c. Show how an employee approves his/her timecard, and submits to the supervisor
3. Show how a salaried employee would edit and submit his/her timecard
   a. Show how an employee utilizes a department or job transfer
   b. Show how an employee approves his/her timecard, and submits to the supervisor
4. Show how an employee can request benefit time (sick, vacation)
5. Show how an employee can view and print a pay stub
6. Show how an employee can view and print their W2
7. Show how an employee can request a change to their direct deposit
8. Show any other areas the employee is able to view relevant information about timecards, paychecks, deductions, etc.

Training and Ongoing Support:
1. Explore any training site/resources available to the payroll clerk, management, Finance, or Human Resources.
   a. If there is a way to submit support tickets electronically, show how a ticket is submitted
   b. If there is a community of users to ask questions to, please show us how it works
      i. Show us how to search previously asked questions
      ii. Show us how to see if the person answering is a user, or staff member of your company
      iii. Is there a rating for content contributors? If so, show us how to review a rating.
   c. Are there manuals, or process instructions that are regularly updated? How are they accessed?
2. Explain how you support/call center operates
   a. What are the hours of your support center?
   b. What additional resources, if any, are added during peak seasons: End of Year, W2, 1095, open enrollment?
3. Are there any reference materials to be provided at implementation or to future new hires, such as how to punch in, review time cards, or access paystubs?