GROSSMONT-CUYAMACA
COMMUNITY COLLEGE DISTRICT

Name_____

Functionality	Comments
1. Demonstrate the following benefits management functions:	
a) Ability to incorporate various benefit plan structures, with age banded/$ cap parameters (e.g., medical, dental, vision, life, LTD, LTC, FSA, TSA, retirement, etc.)	
b) Ability to assign various plans to particular employee groups (e.g., faculty, staff, mangers, administrators, non-bargaining unit).	
c) Ability to manage plans in an ongoing manner, and what kind of alerts/notifications/communications are triggered by changes in HR/PR/WC (e.g., continuing eligibility).	
d) Ability to enroll employees in plans for which they are qualified as well as activation/termination of employee HR records and the integration with District system security/email/benefits/timekeeping/risk management	
e) Ability to enforce the enrollment of employees into required plans, and how does position control/timekeeping/budget interface with benefit administration	
f) Administrative ability to manage COBRA functions, including self-service and communications to the member.	
g) Ability to enroll in plans in self-service mode, especially during on-boarding and open enrollment periods, including reports and an audit process.	
h) Ability to assign self-service benefits as a result of a qualifying event outside of Open Enrollment, including reports and an audit process (e.g., marriage, birth of child).	
i) Ability to transmit enrollment data to various benefits carriers - both initially and in an ongoing manner.	
j) Demonstrate the process used to manage reconciliation of health benefit and other insurance plan payments/charges, including changes of vendors and cost. Please also demonstrate how the system is integrated into the General Ledger/Payroll/Timekeeping/Workers Compensation/Mandated Training/Leaves.	

	k) Ability to upload related documents (e.g., marriage certificate) with security controls, and reminders/alerts for mandatory documentation that is missing	
	l) Ability to bill, collect, and track self-pay benefits, please show how this integrates with position control and timekeeping/paid status	
2.	Demonstrate the ability to enroll an employee in a plan if he/she is not enrolled at the initial time of his/her employment or remove if no longer eligible And how these functions integrate with position control/payroll/system access/email.	
3.	Demonstrate the ability to make retroactive adjustments (e.g., because of late notification of eligibility).	
4.	Demonstrate the ability to notify benefits department and employees/retirees when they should elect Medicare coverage and track enrollees.	
5.	Demonstrate how to track workers' compensation injuries and ability to integrate data with 3rd party providers as well as how this data integrates with payroll/timekeeping/leaves/finance	
6.	Do you have a Risk Management module? If so, demonstrate the capabilities as related to EE mandated training, safety, wellness, ADA, and leave of absences	
7.	Demonstrate the ability to generate Federal/State mandated reporting as EEO, OSHA, Social Security, Unemployment, and Healthcare Reform	
8.	Demonstrate the ability to extract data based on the user preference and date range (e.g., all employees who reached Medicare age, all employees who were out on workers' comp, etc.)	
9.	Ability to make refunds of deductions such as medical premiums, dues, TSA payments. Ability to make Gross to Net Adjustments	
10.	Ability to make balance adjustments to employee's gross balances and dollar balances	

11.	Ability to adjust taxable wages for workers' compensation adjustments. Refund Social Security and Medicare for workers' compensation	
12.	Ability to perform workers' comp calculations and adjust pay accordingly	
13.	Demonstrate the following salary management functions:	
	a) Ability to project the cost of potential salary changes by bargaining unit (e.g., cost of living increases, step and column movement).	
	b) Ability to run reports with the actual cost of step and column at the end of the fiscal year	
	c) Ability to enter a pay increase to be effective at a future date, and anually thereafter	
	d) Ability to enter stipends, auto allowance, phone allowances	
	e) Ability to enter daily rates for those who work extra duty days.(e.g. standby pay)	
	f) Ability to pay overtime and shift differentials.	
	g) Ability to pay on-time payments (e.g. large class bonus, special project, double LED)	
	h) Ability to increase salaries on a global or selective basis by bargaining unit	
	i) Ability to set up multiple salary schedules	
	j) Ability to make retroactive salary adjustments on a global or selective basis With the possibility to tax the retro over a period of time instead of taxing it as income earned in a single month	.
	k) Demonstrate the audit process after the retroactive salary adjustment and prior to paying the retro (workflow)	
	l) Ability to calculate a blended pay rate.	

m) Ability to pay an employee over a period of time (e.g., twelve months) that is different from the perios of time that is worked (e.g., ten months)	
n) Ability to calculate a bonus based on load and the individuals step and column (e.g., large class bonus)	
14. Demonstrate the following administrative leave/time accounting	
a) Ability to do electronic time entry	
b) Ability to do electronic leave approval of time by supervisors	
c) Ability to enter leave without pay in the current time period as well as in advance for employees on a modified schedule (e.g. 10 month employee who receives 12 checks; LWOP 1 day a month for eight months)	
d) Ability to enter FMLA date ranges and track when leave runs out based on usage	
e) Ability to enter and track overtime	
f) Ability to enter and track compensator time	
g) Ability to enter and track release time, banked load, sabbatical time, etc.	
h) Ability to enter and track jury duty time, bereavement, personal necessity, maternity leave, military leave, etc.	
i) Ability to track employees who are eligible for vacation that subsequently become ineligible due to a position change (e.g., employee moves from faculty position to management position, then back to faculty)	
j) Ability to set parameters on usage of certain leave types (e.g., Birthday, Optional vacation – use or lose, usage of leave type equates to one day)	

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15. Demonstrate the ability to set multiple parameters and caps, based on bargaining unit, on the amount of sick leave and vacation time that can be accrued on a monthly and annual basis.(i.e. vacation accrued based on years of service and hours worked, sick accrued annually)	
16. Demonstrate the ability to set parameters on donated sick leave based on bargaining unit (e.g., no more than 40 hours donated per fiscal year and current balance must not drop below 96 hours)	
17. Demonstrate the ability to generate automatic warnings, and send an alert to their supervisor, for those employees approaching their cap for sick time and vacation time.	
18. Demonstrate the ability to notify supervisors when their employees have excess vacation that needs to be used by a specified date based on each bargaining unit. Ability to set the parameter for the notifications (e.g., 6 months prior and monthly thereafter)	
19. Demonstrate the ability to extract leave data on an individual, department, or site based on the user defined date range	
STRS/PERS	
20. With respect to STRS and PERS, demonstrate the following functions:	
21. Ability to enroll an employee if he/she is not enrolled at the initial time of his/her employment. Ability to interface with the STRS REAPS program.	
22. Ability to make retroactive adjustments (e.g., because the employee was paying into the wrong retirement program, because the employee was paying too much/too little into a retirement program)	
23. Ability to make corrections to retirement accounts after retroactive adjustments are made (i.e., updating the payment amounts that were made in previous months)	

24. Describe the cash management techniques that can be used in conjunction with payments to STRS/PERS. Include handling of buybacks and tax deferment of buy-backs	
25. Describe the processes that are used to manage the reconciliation of STRS/PERS payments/charges and how it ties to the General Ledger.	
26. Ability to track Reduced Work Load contracts for faculty (STRS) and pay accordingly through payroll process with correct service credit given.	
27. Ability to make refunds of deductions such as medical premiums, dues, TSA payments. Ability to make Gross to Net Adjustments	
28. Ability to setup employees in an alternative retirement system. (e.g., APPLE)	
29. Ability to setup edits/run reports for any employees not assigned to a retirement system.	

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Evaluation Form
Name of Evaluator:
Perceived Strengths:
Perceived Weaknesses:
Additional Comments:
Acceptability of Vendor Solution: ___ Yes   ___ No