

**RFP INVITATION INSTRUCTIONS
(READ CAREFULLY)**

(1) ALTERATIONS- Any alterations, additions or omissions of required information, changes of the specifications or RFP schedule, are at the risk of the vendor and may result in the rejection of the bid, unless the approver authorizes such changes.

(2) PROPOSALS- All proposals must be typed or written legibly in ink. **Vendors, verify bids before submission. No proposal may be withdrawn or changed after the official opening.**

(3) DELIVERIES- Montgomery County Government assumes no liability for merchandise or other materials delivered without written order of the purchasing director.

(4) RESPONSIBLE VENDORS- Failure of a vendor to execute a purchase order awarded to him or to comply with any of the terms and conditions therein may disqualify him from receiving future business.

(5) PROPOSING FIRM- The agent of the proposing firm hereby certifies to the best of his knowledge and belief that this bid/proposal submitted to Montgomery County has not been prepared in collusion with any other seller of similar products. The prices, terms and conditions of said bid/proposal have not been communicated by the undersigned nor by any employee or agent of the proposing firm to any other seller of similar products and will not be communicated to any such seller prior to the official opening of said proposal. The affiant further states that no official or employee of Montgomery County Government has promised any personal financial or other beneficial interest, either directly or indirectly in order to influence award of this RFP.

(6) IMPORTANT- To be acceptable, all bid/proposals must be on the correct form, and each such bid/proposal must be addressed and delivered to the Purchasing Director, Montgomery County, Tennessee, **350 Pageant Lane, Suite 101-E, Clarksville, TN 37040**, prior to the Bid/Proposal opening. Bid/Proposal envelopes must be **sealed** and **clearly** indicate the words, "BID – (name of item or service)". Such bids/proposals delivered to other persons, locations, or on another form will not be acceptable. ***Electronic is an acceptable submission method via Bonfire or mocobids@mcgtn.net***

All vendors, awarded contracts agree to the terms and conditions herein set forth.

The Purchasing Director reserves the right to reject any or all bids.

Elizabeth L. Black
Purchasing Director
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elblack@mcgtn.net

Request For Proposal for Professional Services for Implementation of Oracle HCM Cloud

I. INTRODUCTION

Montgomery County Government (Montgomery County) requests qualified individuals and firms (System Implementor (SI) with experience in Oracle HCM Cloud System solutions to submit proposals for Professional Services for the Implementation of Oracle HCM Cloud System solution to replace the current ERP system, MUNIS -Tyler Technologies.

Montgomery County desires to engage with a System Implementation partner whose product expertise will lead the County's project team to make best practice-based decisions that the County can accept and implement. The partner will provide Oracle HCM Cloud product expertise, project management, system configuration, reporting, integration development and support to the County's project team which will include members from Human Resources, Payroll, Benefits, Pension, and Information Technology.

a. Montgomery County Overview

Montgomery County, Tennessee is located 30 minutes northwest of Nashville, TN at the Tennessee-Kentucky State Line with a population of 220,000 and growing. Fort Campbell, home to 101st Airborne Division is in Montgomery County. Thus, the County has a large military population. Montgomery County provides the following services to its residents:

- Property Assessment and Tax Payment
- Marriage Licenses
- Passports
- Motor Vehicle and Boat Registration
- Animal Control and Adoption
- Election/Voter Information
- Health Department
- Waste Management/Recycling
- County Highway Maintenance
- Public Safety
- Public Library
- Parks and Recreation
- Building & Codes
- Courts System
- Elected Officials as dictated by State of Tennessee law

The County Government is established by the Tennessee State Constitution and acts as the administrative subdivision of the State. Tennessee Code Annotated (TCA) outlines the structures and rules followed by the County Government.

A County Mayor is elected every four years. The constitutional offices include the County Mayor and eight elected officials including the Assessor of Property, Circuit Court Clerk, County Clerk, Highway Supervisor, Register of Deeds, Trustee and Sheriff. Twenty-one County Commission members represent Districts throughout Montgomery County.

For further information, please visit our website <https://mcgtn.org>.

b. Montgomery County Current Environment

- Montgomery County Government comprises 43 departments, and employs 1,400 full time, part-time employees, and volunteers.
- Montgomery County's legacy HR and Payroll System is Munis by Tyler Technologies. Munis is an ERP system developed specifically for the public sector. The Munis system is a full-functioning ERP with procurement, AP, AR, HR, payroll, and ledger. An overview of the product may be found at <https://www.tylertech.com/products/enterprise-erp>. The database utilized by Munis is SQL Server.
- Montgomery County processes payroll for approximately 1400 employees. Benefits are administered by a third-party vendor named Benefits Inc. Benefits Inc is responsible for open enrollment, new hire registration, and life events enrollment. More information regarding Benefits Inc. may be found at <https://www.benefits-inc.com>. As noted in project scope above, Montgomery County is planning to bring benefits administration and enrollment in-house (when we go-live on Oracle HCM Cloud).

II. Project Scope

The primary objective for implementing the Oracle HCM Cloud product is to substantially improve the County's ability to provide timely and accurate human resource support via improved processes and optimized use of technology. The project must be guided by the goal of reducing low / no-value-add work and improve the quality of information by leveraging automation, workflow, reporting and self-service.

Montgomery County wishes to implement the following scope:

1. **Oracle Recruiting Cloud**. Implementation of Recruiting/ Onboarding including but not limited to applicant tracking, new hire onboarding automation (via Oracle Journeys), configuration of new hire forms, design/build of Career Site Configuration, reporting and metrics.
2. **Core HR**. Implementation of Core HR including but not limited to configuration of organizational structure, manager and employee self-service transactions, manager self-service transactions, approval workflow with up to 7 levels of approval, position management, organizational tree, use of multiple assignments, assignment pay definitions to support payroll and time and labor processing.
3. **Benefits**. Implementation of Benefits including but not limited to configuration of benefit programs, benefit plans, eligibility profiles, life events and employee self-service. This Oracle HCM Cloud implementation will bring the County benefits enrollment and administration in-house.
4. **Absence**. Implementation of Absence Management including but not limited to absence types, absence reasons, absence plans, approval rules and configuration of leave balances. Banking of overtime, as compensation time, is included in scope.
5. **Oracle Time and Labor (OTL)**. Configuration and Implementation including HCM Group Configuration, OTL Rules and Timecard Layouts.
6. **Payroll**. Implementation of Payroll including but not limited to configuration of pay frequencies (biweekly, semimonthly and monthly), earnings elements, deduction elements, tax jurisdictions, banks for payroll payments, tax withholding rules, payroll calendars, payroll costing, payroll units, tax reporting, pay periods,

unemployment insurance rates, salary basis, garnishments, retro pay processing, payment methods, County custom pay advices and checks with related ability to print both, self-service for tax elections (new hire and changes), payment methods and viewing slips online.

7. **Oracle Guided Learning**
8. **Data Conversions** from Existing ERP and benefits management vendor. SI will be required to perform the number of mock conversion iterations required to ensure that all data has been converted accurately. The County and SI will agree upon the estimated number of mock conversion anticipated to ensure a successful HCM migration. Conversion activities will include, but are not limited, to the following:
 - a. Planning
 - b. Data Cleanup Approach and Execution
 - c. Data Mapping Review
 - d. Specification Review
 - e. Validation and Testing
9. Inbound Integrations
 - a. ADP Wage Garnishment (via ADP Smart Connect and Compliance tools)
 - b. Empower 401 K deductions
10. Outbound Integrations
 - a. Guardian
 - b. Ameriflex
 - c. Lincoln
 - d. Blue Cross/Blue Shield of Tennessee
 - e. TCRS (Tennessee Consolidate Retirement System)
 - i. This is a proprietary file specific to the state of Tennessee
 - f. iOPs
 - g. ADP Tax Reporting
 - h. ADP ACA Reporting
 - i. Empower 401K contribution reporting
 - j. Regions Bank Positive Pay File
 - k. Integration to existing ERP (MUNIS) GL for payroll gross to net costing
11. Review and revision of business process documentation to ensure consistency with HCM cloud environment.
12. Provide County with Testing/Acceptance Plan. The SI must test all configuration, modifications, interfaces, and data conversion prior to turning over to the County for testing. The SI should provide the following:
 - a. System Test Plan
 - b. User Acceptance Test Plan
 - c. Parallel test plan
 - d. Conversion test plan
13. Design/Validation of Custom Reporting – List of custom reports can be found in the Appendix
14. Reduction of manual processes

The selected SI may be a leading candidate for Montgomery County's anticipated Phase II implementation of additional modules to include but not limited to Learning Management, Performance Management, and Celebrate.

III. Current County Project Team

- Human Resources - team members provide human capital management, benefit, payroll and time services.
- Information Technology - team members are responsible for providing the technology platforms to support the project, legacy platform support for HCM and Payroll; as well as project management services for technology implementations.

IV. Current Project State

Montgomery County began the implementation of Oracle HCM in July, 2023, with another implementation partner. On Friday, July 5, 2024, the contract between Montgomery County and the implementation partner ended.

To date the project has completed design and unit testing, however, there may be additional design/unit testing necessary. It is expected the new SI will provide feedback on any identified missing design during any discovery/restarting phases. It is required for the SI to include their estimate/assumption around redesign activities in their proposed timeline/fees.

Key Status to consider for this Proposal, include, but are not limited to:

- **Conversion:** The project started conversion efforts late and has NOT completed a full data extract, translate and load (ETL) into Oracle HCM Cloud. The project began the process of a full data conversion in June 2024; however, the process did not complete prior to releasing the implementation partner. Outstanding tasks include loading of Benefits Dependent Enrollment, Beneficiary data, and payroll balances (summary, QTD, and YTD) into Oracle HCM Cloud.
- Montgomery County conversion is a top-of-stack conversion and Montgomery County has completed development of SQL scripts to extract/translate the data from our legacy systems filling in the loading templates.
- **Configuration:** Absence Management, Core HR, Payroll, and ORC have been configured in TEST and DEV 1 Pods. This configuration is based on workshop spreadsheets and workshop discussions between the previous SI and the Montgomery County Team. It is important to note that these configurations have not been fully verified by the Montgomery County Team. The previous implementation partner did conduct unit testing, however, unit test results are pending at this time. The project has not formally started Payroll Parallel (PP) or User Acceptance Test (UAT) testing.

Payroll Costing is a key requirement of Oracle HCM Cloud and the following highlights progress to date, that should be considered in your proposal estimates:

- Payroll costing was configured and included custom development of a gross to net data extract/report.
- The County has unique requirements on how to derive costing strings based on certain costing segments defaulting from position and/or element configuration values, or both. This requirement influences the need to deviate from the delivered costing hierarchy, which resulted in the custom solution developed by the previous SI.
 - While the County chose one of 2 options presented, on the solution, and has seen good unit testing results, it does expect the new SI to assess and recommend to stay

on the current solution path (desired to avoid cost) or recommend and justify how a different solution may be of more value to the County

- While Unit testing was looking satisfactory, there are outstanding fixes (and retesting) at the time of the termination of the previous SI, where it is expected the new SI will address (assuming all parties agree to continue down the current solution path)
- **Branding:** Oracle HCM Cloud has been branded as MyPATH in one of our PODS (Test). This branding needs to be replicated in all our PODS (DEV1, DEV2, and PROD). All graphics will be provided.
- **Redwood:** Redwood Pages have not been configured for use with Oracle Time and Labor (or in any other modules). It is our understanding that this is required before the 24D quarterly update. Montgomery County has a requirement to have Oracle Time and Labor to be configured to have a time card layout that allows optional costing overrides. We expect consultative services from the SI on the best practice regarding when and how to implement Redwood per module.

- **Integration Development Overview**

- i. **Empower Inbound** – Previous Partner was working on development of the inbound Empower File. The file will be encrypted with a PGP that Montgomery County generated and provided to Empower. The previous partner stated that they were nearly complete with the inbound process, however, Montgomery County was never given an overview of the process, nor have we reviewed any code related to the inbound process.
- ii. **Empower Outbound** – The e-text template for both the 401K and 457 outbound file formats have been created in BIP. However, the reports have not been generated or validated by Montgomery County. Work will most likely still need to occur on the e-text template once the file format has been generated, review by Montgomery County, and tested by Empower.
- iii. **ADP pay slip data** (as part of the ADP Garnishment processing service) – This is a PGP encrypt file send to ADP. This integration is developed and has been tested and validated by both Montgomery County and ADP. The file format for this is just the xml data created by the Pay Slip Bursting Data Model. This file is part of the ADP Garnishment process.
- iv. **ADP ACA Data** – This integration data models and file formats are supplied by ADP. ADP has not validated the files.
- v. **ADP Inbound Garnishment** – This uses the ADP Smart Connect for Oracle Fusion. We are currently testing the process. There has been configuration in the non-prod PODs, per ADP’s configuration guide, by the previous implementation partner.
- vi. **Guardian** is our provider for Critical Illness, Accident, and Cancer policy. Guardian uses the HIPAA 834 file format for all policy types and has a specific code for each of the policy types. The previous implementation partner has developed the integration; however, the Loop 2000 does not include the dependent information and the codes for the different policy types are incorrect. Montgomery County has created a sample file to demonstrate the file format.
- vii. **BCBS of Tennessee** is Montgomery County’s provider for medical, dental, and vision insurance. BCBS also conforms to the HIPAA 834 file format. Like the Guardian file, the BCBS file is also missing the dependent information in Loop 2000.
- viii. **Ameriflex** is Montgomery County’s provider for FSA and dependent care. This file has been tested and validated by both Montgomery County and Ameriflex. This file does not require any additional work.
- ix. **Lincoln** is Montgomery County’s provider for basic life, voluntary life, long and short term disability. The integration has been developed but not validated by Montgomery County or the vendor.
- x. **TCRS (Tennessee Consolidated Retirement System)** file is developed, and the file format has been validated by Montgomery County. However, we have not validated the contents of the file and the file has not been verified by the provider.
- xi. **iOPS integration** - iOPS is an application that our Emergency Management Services team uses for timekeeping and shift management. Oracle will be the system of record for Absence and Time & Labor, with a feed into iOPS using Rest-API. Employees (or the timekeeper) will be responsible for entering timesheets in Oracle.

- **Project Configuration State and Scope**

- **Overall Configuration Scope**

- 1) United States Only
 - 2) 3 Legal entities
 - 3) No Unions
 - 4) Business process variation by organization

- **Security**

- 1. Seeded Job Roles
 - 2. 1 Custom Job Role
 - 3. 6 AORs
 - 4. 2 Security Profiles

- **Core HR**

- 1. Standard ESS/MSS functionality
 - 2. ~50 Locations
 - 3. ~65 Departments
 - 4. Position Management in use
 - 5. Grade step progressions
 - 6. Multiple salary basis set up based on annualization factors
 - 7. Flexfields and People Group in use
 - 8. Complex approvals of up to 7 levels
 - 9. Seniority dates in use and formula driven
 - 10. Seeded job roles
 - 11. 1 Custom job role
 - 12. 6 AORs
 - 13. 2 Security Profiles

- **Benefits**

- 1. 2 Programs
 - 2. 33 Plans
 - a) 5 Medical/Dental/Vision
 - b) 4 FSA
 - c) 2 Life and AD&D
 - d) 3 Disability
 - e) 7 Retirement
 - f) 12 Voluntary/EAP
 - 3. 22 Life Events
 - 4. 28 Fast Formulas
 - 5. 22 Eligibility Profiles
 - 6. 6 Carriers
 - a) BCBS
 - b) Guardian
 - c) Ameriflex
 - d) Lincoln
 - e) Empower
 - f) TCRS
 - 7. COBRA Administration handled by BCBS and Benefits Inc.
 - 8. Retiree Benefits are not currently configured
 - 9. FSA Claims administration handled by Ameriflex

Payroll

1. 3 Legal Entities
2. 8 payroll definitions = Configured
3. 4 Payroll frequencies (Bi-Weekly, Semi-Monthly, Monthly, Yearly)
4. 10 third party payees
5. Single Organization bank account
6. Cost Key flex with six segment and value sets
7. Enable Retro and Arrears
8. Delivered ACH, Direct Deposit and Pay slips. No custom pay slip.
9. Customized check writer check template
10. Configuration of in-house check printing for off-cycle checks
11. 5 fast formulas configured. More may be required.
12. Base element definitions configured today
 - a) 6 Employer Liability
 - b) 15 Pretax
 - c) 28 Voluntary Deductions
 - d) 1 Non-Payroll payments
 - e) 16 Absence elements
 - f) 10 Time elements
 - g) 60 Earnings elements
 - h) 5 Supplemental earnings
 - i) Retirement Plans - 401k / 457 setup
13. Mid-Year Balance conversion
14. ADP for
 - a) Tax filing
 - b) Garnishments
 - c) Year End /W2

Time and Labor

1. 2 Timecard layouts
2. 2 Time Entry Groups
3. 3 Time Categories
4. 2 Time Consumer Sets
5. 2 Time Entry Profiles
6. 2 Time Processing Profiles
7. 1 Repeating Period
8. 14 Work Schedules
9. 4 Fast Formulas
10. 5 BIP Reports

Absence Management

1. 13 Absence Types
2. 15 Absence Plans
 - a. 5 Accrual
 - b. 5 Qualification
 - c. 2 Compensatory
 - d. 1 Donation
 - e. 2 No Entitlement
3. 10 Repeating Periods
4. 14 Work Schedules
5. 6 Eligibility Profiles
6. 11 Fast Formulas

Recruiting

1. 4 Offer Letters which Include Advanced Conditional Logic
2. 2 Candidate Selection Processes (CSPs)
3. 2 Fast Formulas to Support CSPs
4. 4 Candidate Application Flows
5. 1 External Career Site
6. 4 Custom Security Roles
7. Recruiting Booster
 - a. Resume Parsing
 - b. Two-Way Candidate Messaging
 - c. Hiring Events
 - d. Enhanced Interview Scheduling
 - e. Interviewer Work Area
8. Integration With
 - a. Microsoft O365
 - b. LinkedIn Recruiter System Connect (RSC)
 - c. Optimized Apply with Indeed
9. Position Management in Use
10. No Recruiting Conversion (Montgomery County will 'Start Fresh' for Recruiting)

Journeys

1. 6 Journeys
2. 45 Journey Tasks
3. 25 BIP Templates for 'Report' and eSignature Tasks
4. 2 Bursting Email Notifications
5. 5 Eligibility Profiles (Conditional Routers)
 - a. 3 Based on Standard Eligibility Criteria
 - b. 2 Based on Fast Formula Criteria
6. 2 Custom Security Roles

Data Conversion

1. Mid-Year Payroll Balance Conversion – Not Started
2. Mid-Year Benefits conversion – Not Started
3. Mid-Year Absence Balance Conversion – Not Started
4. Top of Stack Core HR Conversion – Mostly complete
5. Montgomery county will extract the data from the legacy system. SI will transform the data into HDL format.

6. Documentation of the conversion transformation process is not available
7. The scripts the prior SI used for conversion are not available

V. IMPLEMENTATION AND CONSULTING SERVICES REQUIREMENTS

The following information is required in the proposal. Please provide the following details as it relates to your implementation and consulting services:

- a. Describe your consulting services organization (i.e., years of Oracle HCM Cloud services, staffing levels and skills). Does the firm have a separate public service practice?
- b. Provide a list of all the firm's clients comparable to the County indicating the length of service of each account. The County may contact and/or visit any of these accounts.
- c. Staffing
 - a. Describe how appropriate project leadership and SI staff will be identified and assigned to County for each module of the project.
 - b. Provide proposed staff resumes/credentials.
 - c. Provide the **active** Oracle HCM Cloud certifications in place for any resources proposed to Montgomery County.
 - d. Does your firm have at least 5 years of experience implementing Oracle HCM Cloud?
 - e. Will the implementation team that is assigned to our project be at least 75% employees vs contractors?
- d. Does your firm have a rescue/restart projects experience? If so, please share the most recent example including scope of the project, how your firm corrected the critical path, and enabling client to a successful launch of their Oracle HCM. Provide your implementation methodology, highlighting any relevant approaches appropriate for restarting a paused project. Expected methodology to include, but not limited to
 - a. Describe the project management tools that are used during implementations (e.g., work plans, meetings, conference calls, status reports, workflow charts, issue log and resolution, staff management). Attach examples of your tools.
 - i. Highlight any testing (e.g., Parallel Compare tools, Defect Tracking), conversion and/or migration assets
 - b. Key phases with descriptions of purpose and deliverables
 - c. Proposed timeline of the above key phases and proposed go-live date
 - d. Describe project approach relating to guidance with business process/functional understanding and how that is shared with the client team (to make the right decisions when addressing solution options)
 - e. Describe your methodology of testing and preparing for Oracle Quarterly updates.
 - i. Please share the approach to ensure the County is able to adequately check-in and test future Quarterly updates at the end of Hypercare.
- e. Describe the support you typically provide post upgrade (e.g., Hypercare and/or other services).
- f. Describe the Oracle HCM modules for which your firm possesses specialized implementation expertise and experience. Identify modules by name and version and describe the approach taken by your firm to develop and maintain expertise in the software and associated implementation issues.
- g. Provide references of implementations where your firm has replaced a previous implementation partner.
- h. Provide a proposed detailed project plan with major milestones and key deliverables indicating critical path and dependencies. The work effort should be at the lowest possible level and indicate task responsibility as either SI or County. This should not be considered a binding project plan but a sample for Montgomery County use only.
- i. Describe the roles and responsibilities for the proposed project for your firm and the County.

- j. Describe the mechanisms used to keep business process owners and executive leadership involved in project activities and appraised of project status.
- k. Describe the escalation process and risk mitigation strategy that your firm uses to ensure that an appropriate level of attention is given to problems and complaints.
- l. Describe the process for proposing changes to the project plan that were not covered in the original scope of work (change orders).
- m. Describe your quality assurance mechanisms and approach.
- n. Describe your data conversion methodology that will be used.
 - a. What tools are available to assist with data conversions and validation?
 - b. What is the recommended number of conversion iterations?
- o. Describe your methodology for implementing interfaces and reports.
- p. Describe your organizational change management strategy and services.
- q. Describe your project communication strategy and services.
- r. Describe your training strategy and services.
- s. Describe your go-live and post go-live strategy and support.
- t. Describe your methodology for conducting testing and developing test plans and test scripts.

VII. PRICING

1. The County seeks a clear and comprehensive understanding of all costs associated with the implementation. System Implementor can price an on-site/off-site implementation plan. The County prefers majority of the functional resources to be located in North America; while off-shore resources are acceptable for non-client-facing technical work. The pricing must include a phased approach and include the following:
 - Implementation and Configuration
 - Project Management
 - Business Process Review
 - Training
 - Documentation
 - Interfaces
 - Reports
 - Conversion
 - Communications Management
 - Travel
 - Post Go-Live Support

2. Pricing should be provided in a phased model per module. A milestone payment deliverables table shall be developed and proposed by the SI, used for each phase of the project. The County and SI will agree upon deliverables to be produced at each milestone. Pricing quotes must be delivered as a separate component to the RFP and should be placed in a separate sealed envelope.

VI. REFERENCES

Responder shall provide three (3) references for projects similar in size and scope to the project specified herein using the Contractor Reference and Release Form.

VII. TIMELINE

The timeline set herein represents Montgomery County Government's best estimate of the schedule that will be followed. However, delays to the procurement process may occur which may necessitate adjustments to the proposed schedule. If a component of this schedule, such as the close date, is delayed, the rest of the schedule may be shifted as appropriate. Any changes to dates up to the closing date of the RFP will be sent out as an official, written addendum prior to the closing date of the RFP. After the close of the RFP, the County reserves the right to adjust the remainder of the proposed dates, including the dates for evaluation, negotiations, contract award and the contract term on an as-needed basis with or without notice.

Tasks	Date
RFP Release Date	08/16/2024
Mandatory Pre-Proposal Conference	9/11/2024
Deadline for Questions	9/20/2024
Addendum for Response to Questions Issued	09/25/2024
SOLICITATION DUE DATE: All proposals must be submitted by this date/time	10/07/2024 2:00 PM CST
Initial Screening of Technical Proposals	10/11/2024
Notify Finalists for Presentations	10/14/2024
Presentations (Virtual)	10/21/2024 -10/29/2024
Final Scoring of Technical Evaluations	11/01/2024
Best and Final Offer Issued	11/01/2024

Mandatory Pre-Proposal General Web Conference

Proposers must attend the Mandatory Pre-Proposal Web Conference on 09/11/2024, at 9:00 AM Central Standard Time (CST). To receive a link to the Mandatory Pre-Proposal Web Conference, SI must contact Kim Lockhart(kslockhart@mcgtn.net) by 5:00 PM CST on 09/10/2024 to receive an invitation link. No minutes will be recorded. The purpose of the conference is to discuss the RFP scope of services and contract requirements. While questions will be entertained, the oral response to any question at the conference shall be considered tentative and non-binding with regard to this RFP. To formalize, SI must submit questions in writing to Montgomery County following the Pre-Proposal Web Conference. The Montgomery County will disseminate written questions and answers in the form of an addendum.

VIII. CRITERIA FOR EVALUATION OF PROPOSALS

The following evaluation criteria and the maximum points stated below will be used as the basis for the evaluation of proposals.

No	Criteria	Points
1	Technical Approach to the Project	25
2	Project Management	25
3	Organizational Qualifications	20
4	Personnel	10
5	References	10
6	Cost	10
	Total	100

Appendix A – Configuration Overview

1. Legal Entities
 - a. County of Montgomery
 - b. Clarksville Montgomery County Public Library
 - c. 911 Emergency Communication District
2. Payrolls Definitions
 - a. County Commissioners Monthly
 - b. Elected Officials Semimonthly
 - c. Fire Services Monthly
 - d. Fire Services Yearly
 - e. Fire Services Monthly
 - f. E911 Biweekly
 - g. MoCo Biweekly
 - h. Public Library Biweekly
3. Payroll Elements
 - a. [Payroll Elements.xlsx](#)
4. Payroll Costing
 - a. [Costing Elements Template.xlsx](#)
5. Fast Formulas
 - a. [Fast Formulas.txt](#)

Appendix B – Configuration Reports

- 1) Legal Structures
 - a. [Legal Structures Configuration](#)
- 2) Organization Structures
 - a. [Business Unit](#)
- 3) Workforce Structures
 - a. [Workforce Structures](#)
- 4) Elements and Formulas
 - a. [Elements and Formulas](#)
- 5) Payroll
 - a. [Payroll config](#)
- 6) Benefits
 - a. [Benefit Eligibility Profile](#)
- 7) Absence Management
 - a. [Absence Management](#)

Appendix C – Integration File Formats

1. [ADP SmartConnect Oracle HCM Integration .docx](#)
2. [Ameriflex Integration.pdf](#)
3. [BCBS HIPAA-834-5010-Layout \(2022\).pdf](#)
4. [Empower 457 Outbound Integration.xlsx](#)
5. [Empower Outbound 401K Integration.xlsx](#)
6. [Empower Inbound Deferral Integration.docx](#)
7. [Empower Inbound Loan Integration.docx](#)
8. [Guardian Integration.pdf](#)
9. Integration from Payroll to Legacy ERP (accounting information) Custom BIP Report
10. Tennessee Consolidated Retirement System(TCRS) Integration
 - a. [TCRS Integration.pdf](#)

Appendix D – Custom Report Development

Montgomery County's previous implementation partner has developed several custom reports using BIP and OTBI, however, these reports have not been tested by Montgomery County. Other reports were slated for development, but have not yet been developed. Below is a listing of the custom reports.

- 1) Calculated and Transferred Time FDD – Excel Output
 - a. This report will fetch Data only for employees who have submitted/approved timesheets in given Date range of Process Date from and process Date to parameter
- 2) Christmas Club Report
 - a. This report will fetch Data only for employees who is having Christmas Club Element entry and deduction in the system in given Date range of Process Date from and process Date to parameters.
- 3) Detail Check History Report
 - a. This report will all the processed payroll of an employee with all earnings and deduction in the system in given Date range of Process Date from and process Date to parameters. Element will be grouped based costing code of those elements and check date.
- 4) Employee Deduction Register
- 5) Employee Pay Report
 - a. This report will fetch employee pay data in given Date range of Process Date from and process Date to parameters for all earnings elements with total sum amount for each element.
- 6) Equal Employment Opportunity Report
- 7) OSHA Reporting
 - a. The purpose of this document is to extract Occupational Safety and Health (OSHA) employee data from system for the reporting purpose. This data is required for reporting to the federal government.
- 8) Payroll Audit Report
- 9) Payslip Customization- The purpose of this document is to extract the time entries by employee ID, last name, first name, check date, check number, amount, fund, department, program, function, object, project.
- 10) Unemployment Report
 - a. The purpose of this document is to extract a quarterly unemployment report from the system
 - b. Census Benefit Enrollment Report - The purpose of this document is to extract the list of Benefit Census Enrollment report in the system with details.
- 11) Benefit Life Event Notification Report - Should be a notification event
 - a. The purpose of this document is to send the life event notification to the admin.
 - b. Notification to be sent to the administrator who is associated with benefits admin role.
 - c. Life events to be considered – All.
 - d. Life event status – Should not be processed and closed
- 12) Time Calculated and Transferred Report – Notification
 - a. The purpose of this document is to remind the timekeeper that they have pending timesheets to be submitted or pending approvals on timesheets
- 13) Accruals Report (Test Environment under Absence)
 - a. The purpose of this document is to extract Accrual details across every cost center
- 14) SCAAP Report
 - a. The purpose of this document is to extract employee's assignment and pay details for Jail Employees
- 15) Absence Entry Report (in BIP but not on the list of custom reports in the Report Functional Design Area)
- 16) Retirement Plan Report (in BIP) but not on list of custom reports in the Report Functional Area
- 17) Downtown Parking E-signature document)

- 18) Vacancy Report
- 19) Check Printing – Ready for testing with bank. Will send with positive pay file during payroll parallel.
- 20) Munis Extract – BIP Report (hasn't been modified since 4/16) Report was tested and found to contain invalid account strings.
- 21) Position Costing Override Report – BIP (Never Tested)
- 22) Position Costing Override Summary Report (Never Tested)
- 23) Munis Position Costing Override Report (Never Tested)
- 24) MoCo Timesheet by Employee
- 25) MoCo Employee Timesheet Reminder Notification Report
- 26) MoCo TimeKeeper Alert Notification Report
- 27) Candidate Merge Summary
- 28) Candidate Pool Member Print
- 29) Recruiting Configuration HC
- 30) Job Application Print
- 31) Job Offer Approval
- 32) Job Offer Details
- 33) Job Offer Letter – These are developed; however, they require Montgomery County to have multiple types of employees. We need to revisit how the rtf template is coded.
- 34) Job Offer Letter E-signatures
- 35) GigAssignmentApproval
- 36) GigAssignmentReject
- 37) Offer Details Report
- 38) Recruiting Time to Fill Report/Recruitment Timeline
- 39) Requisition Approval

APPENDIX E UNRESOLVED ISSUE

- 1) Multiple setups required for approval workflows when the workflow has multiple approval levels executed serially.
 - a. [Job Requisition Approval .docx](#)

- 2) User would like to default the Source Assignment Status = "Active - Payroll Eligible", while using Quick Action for "Add Assignment" for Temporary Assignment. Currently it is defaulting to "Suspended - No Payroll" and requires manual step for user to select "Active - Payroll Eligible"
 - a. [Temporary Assignment Default to Suspended.docx](#)

- 3) The job application template for the Sheriff's Dept does not seem to be configured according to the requirements initially provided. Currently in the UAT environment, the questions are out of order, the ability to check boxes aren't built, etc.

- 4) Timecard Submission error during costing data entry. Need to ensure that configurations changes are made in the DEV1 environment per SR **3-36217554361 : Timecard Save or Submit Error post enabling Cost Overrides** after application of Oracle Data Fix. Action Plan should have been followed in the Dev1 instance after data fix was applied.

- 5) **Unable to Send Notification to Journey owner when Journey is completed.** Oracle has referred us to documentation and are suggesting that our design must change. Oracle updated on the issue:

Please refer to the last column in the excel file at [Quick Guide: Journeys - Alert Templates for Journeys](#):
<https://community.oracle.com/customerconnect/discussion/630996> to understand who will receive the different notifications.
If a change in design is needed, please log an Idea on Idea Lab
<https://community.oracle.com/customerconnect/categories/idealab-hcm-human-resources> with your specific use cases.



Montgomery County Government

Purchasing

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Elizabeth L Black
Purchasing Director

Phone: (931) 648-5720
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IRAN DIVESTMENT ACT Certification of Non-inclusion

NOTICE: Pursuant to Divestment Act, Tenn. Code Ann. 12-12-106 requires the State of Tennessee Chief Procurement Officer to publish, using creditable information freely available to the public, a list of persons it determines engage in investment activities in Iran, as described in 12-12-105. Inclusion on this list makes a person ineligible to contract with the State of Tennessee; if a person ceases its engagement in investment activities in Iran, it may be removed from the list. A list of entities ineligible to contract in the State of Tennessee Department of General Services or any political subdivision of the State may be found here:

[https://www.tn.gov/assets/entities/generalservices/cpo/attachments/List of persons pursuant to Tenn. Code Ann. 12-12-106, Iran Divestment Act-July.pdf](https://www.tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn._Code_Ann._12-12-106,_Iran_Divestment_Act-July.pdf)

By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not on the list created pursuant to T.C.A. 12-12-106.

Vendor Name (Printed)	Address
By (Authorized Signature)	Date Executed
<i>Printed Name and Title of Person Signing</i>	



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**Non-Boycott of Israel Act
TCA 12-4-1**

Concerning the Non-Boycott of Israel Act (TCA 12-4-1 et seq.), by submission of this bid/quote/proposal, it is certified by each supplier and each person signing on behalf of any supplier. In the case of a joint bid/quote/proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each supplier is not boycotting Israel pursuant to § 12-4-1 and will not during the term of any award. **Note: Applicable only to contracts of \$250,000 or more and to suppliers with 10 or more employees.**

The undersigned hereby acknowledges receipt of these affidavits and certifies that submittal in response to this solicitation is in full compliance with the listed requirements. Failure to give proper acknowledge to issues concerning the above is grounds for bid rejection and may subject the signer to penalties as directed by the appropriate laws.

Organization Representative/Designee

Date

Organization Name

Address

Phone



Montgomery County Government

Purchasing

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Contract Number

TITLE VI CONTRACT ASSURANCE

It is the policy of Montgomery County Government not to discriminate on the basis of race, color, national origin, age, sex, or disability in its hiring and employment practices; or in admission to, access to, or operation of its programs, services, and activities. With regard to all aspects of this contract, Contractor certifies and warrants it will comply with this policy.

Please Print:

Contractor's Name

Street Address

City

State

Zip Code

Contractor's Phone Number

I, _____, hereby agree to

abide by the Title VI Regulations.

Signature

Date

For Title VI compliance, we ask for voluntary disclosure of the following information:

Ownership Type (please check all that apply):

- ___ African American Owned Business
- ___ Women Minority Owned Business
- ___ Female Owned Business
- ___ Native American Owned Business
- ___ Hispanic Owned Business
- ___ Asian Owned Business
- ___ Disabled Owned Business
- ___ All Others