

# **REQUEST FOR PROPOSAL**

## **Time & Attendance Management, HR, and Payroll Software/System**

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**October 2, 2020**

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## Purpose

The College of Physicians & Surgeons of Alberta (CPSA) is seeking proposals for a Time & Attendance Management, HR, and Payroll software/system. CPSA is currently utilizing Replicon for Time Management and Microsoft Dynamics GP 2016 for its HR, Payroll, and Accounting services. It is now looking to utilize a new software/system that can provide all three (3) systems in one umbrella.

CPSA requests that the term of the contract for the new software/system start approximately January 1, 2021 for an initial five (5) year period with the option to renew for a consecutive two (2) year period at CPSA's discretion.

The proposal should include options for purchase of software or a service contract.

The current software program for payroll processing is owned by CPSA and hosted on our servers. Other HR software is hosted on our servers or is on-line hosted by a vendor server.

This request for proposal (RFP) contains background information on CPSA and specific information that must be included in the proposal submitted. The proposal must be submitted as a PDF, with the exception of the vendor checklist completed as an excel document, via email, no later than 3:00pm, Friday, October 23, 2020 directly to:

Joyce Realon, Payroll and Accounting Coordinator  
College of Physicians & Surgeons of Alberta  
Email: joyce.realon@cpsa.ab.ca

## College of Physicians & Surgeons of Alberta

### Our Organization

CPSA is responsible for the regulation of the medical profession in Alberta. The main lines of business include:

- Registering physicians
- Supporting continuing competence
- Investigating and resolving physician-related complaints
- Contributing to public policy affecting health care delivery
- Accrediting health facilities
- Guiding professional conduct and ethical behavior

CPSA's web site is [cpsa.ca](http://cpsa.ca).

CPSA currently operates under the authority of the *Health Professions Act* and applicable regulations and bylaws.

CPSA's governing council includes physician members, public members, and representatives from Alberta's medical schools. Physician members are elected annually by Alberta doctors, while public members and medical school representatives are appointed. CPSA staff, all located in Edmonton, number approximately to 155. The Chief Executive Officer, who carries the title Registrar, is Dr. Scott McLeod.

## Our Vision

The highest quality medical care for Albertans through regulatory excellence.

## Our Mission

To protect the public and ensure trust by guiding the medical profession.

## Current Computer Systems

- Microsoft Dynamics GP 2016 ("GP") – for processing payroll, accounting, and some HR transactions (Software owned; on CPSA servers)
- Liaison Messenger EDD – integrates with GP when sending out pay advices
- Crystal Reports – integrates with GP for payroll reporting
- BI360 Software Suite – integrates with GP for budgeting, reporting, and data warehousing
- CRG emPerform – performance management software
- StartDate – applicant tracking system software
- Replicon – time tracking software

## Statistics based on 2020 activities

- Approximately 155 active employee records, with a semi-monthly payroll of approximately \$450,000
- Direct deposit for payroll including up to 2 bank accounts for each employee
- Approximately 1,700 applicants to track in a year
- Approximately 20 record of employment (ROE) processed in a year
- Approximately 180 T4s and T4As processed in a year for payroll plus 170 committee member T4s

## Time & Attendance Management, HR, and Payroll software/system Definition

### Introduction

The Time & Attendance Management, HR, and Payroll software/system definition sets out the basic services and features required for the proposal. Vendors are requested to provide recommendations and/or suggestions of services and features beneficial to CPSA, not mentioned and included in this request.

Please refer to Appendix A for a more detailed description of the services and features required for each of the time management, HR and payroll needs.

Additional functionality or features:

### Technology –

User-friendly interface and dashboards, including a focus on employee user experience
Mobile-app availability for employees
System stability - 99.99% uptime
Option to host on CPSA Server
Any online system must be hosted in Canada
Encrypted Traffic between client and server
Data export capability from system to other reporting tools

**Customer Service –**

Customer service and support available 8:00 am – 5:00 pm MST, with response times within 4 hours
Resources and support services readily available
Dedicated relationship manager
Training resources available
Training sessions offered to system administrators and users
Clear escalation paths for concerns

**Implementation –**

Proposed go live dates <ul style="list-style-type: none"><li>• Time management January 18, 2021</li><li>• Remaining implementation dates to be determined for Q1 2021 based on software features. CPSA will roll out the HR and the Payroll components in a phased approach.</li></ul>
Describe the implementation plan proposed

**Proposals**

To be considered as the successful software/system provider, the vendor should be able:

- to provide a software/system that can be fully implemented in a phased approach
- to describe in detail the implementation process for the software
- to respond and submit CPSA’s requested documents/services in a timely manner

**Required Vendor Information**

The following information should be included in your proposal to CPSA:

**Company Information**

- Describe the company’s qualifications and experience with respect to the required services and features described in the Time & Attendance Management, HR, and Payroll software/system definition above
- Discuss the company’s customer service philosophy and how it provides an edge against other software providers
- Name/s and contact information for the key personnel who would serve as the primary contacts for CPSA
- Describe how the dedicated relationship manager will work with CPSA to ensure the smooth transition from the old to the new software
- Describe how the transition from the implementation manger to the relationship manager will be handled in a seamless manner.
- Describe any project management or administrative support that would be part of the firm’s services to CPSA. If any portion of the project is to be done by subcontractors, please include in the pricing information.
- Document/s that outlines commitment to client privacy.

CPSA will not be held liable for any delays in implementation beyond CPSA's control.

## **Customer Service**

### **Pricing Information**

The proposal must include a detailed description of the basis for the charging of fees and expenses associated with the project:

- Estimate of the total hours of work required to complete software/system configuration, tests, and implementation
- Annual and/or monthly rates (fixed and variable) for the required services/features
- Rates for any value added services/features
- Other fees charged

The proposal should also address:

- Extra billing practices
- Strategies to minimize any additional costs/fees, while still providing an appropriate level of relationship manager involvement during the course of implementation and after-implementation
- Proposed schedule of billing dates
- Option for purchase of software versus online hosted software

### **Software/system enhancements**

The proposal must include how CPSA is notified of software/system changes/upgrades and how CPSA is supported through the change.

Identify any fees associated with enhancements/upgrades.

Identify any planned enhancements for the next two years, and if the changes/upgrades are mandatory or optional.

### **Vendor Checklist**

The proposal must include a completed vendor checklist with additional notes/descriptions on the required services and features as deemed necessary.

Please refer to Appendix A.

### **References**

Please include three references. References for similar projects and/or organizations similar in size to CPSA are preferred.

## Proposal Process

### Schedule

October 2, 2020	RFP will be made available to invited firms.
October 14, 2020	Firm to submit questions for CPA regarding the RFP
October 23, 2020	All proposals must be submitted to CPSA by 3:00 PM MST of this day.
October 26- November 6, 2020	Internal screening of proposals. CPSA will develop a short list of at least three (3) firms
November 13/16, 2020	Shortlisted firms will present their proposal in a virtual session, including a demo of the software
November 16-20, 2020	CPSA to check references
November 23, 2020	Selection of the successful firm will be made and negotiation of terms of engagement undertaken. Other short listed firms will be notified.
January 18, 2021	First phase, time & attendance tracking module goes live.

### Proposal Requirements

Proposal responses must not exceed 20 pages in length, including all attachments and appendices. Font to be no smaller than 11 point. Proposals must be submitted no later than 3:00 PM MST, October 23, 2020, in PDF format with the appendix in excel, directly to CPSA via email, addressed to:

Joyce Realon, Payroll and Accounting Coordinator  
College of Physicians & Surgeons of Alberta  
Email: joyce.realon@cpsa.ab.ca

### Selection Criteria

Proposals will be evaluated against the following criteria:

Criteria	Weight
Services/Features – Time Management Module	15%
Services/Features – HR Module	15%
Services/Features – Payroll Module	15%
Technology	15%
Customer Service - Including feedback from references	10%
Implementation	10%
Fees/Costs	20%
<b>TOTAL</b>	<b>100%</b>

Those firms whose proposals are selected for further consideration will be asked to make a virtual presentation which includes a demo of the proposed software and/or answer questions in advance of our final selection.

## **Proposal Conditions**

### **Contingencies**

This Request for Proposals (RFP) does not commit CPSA to award a contract. CPSA reserves the right to accept or reject any or all proposals or waive irregularities if CPSA determines it is in the best interest of CPSA to do so.

### **Acceptance or Rejection of Proposals**

Proposals shall remain open, valid, and subject to acceptance anytime up to three (3) months after the proposal opening date and time. CPSA realizes that conditions other than lowest cost are important and will award contract(s) based on the proposal(s) that best meet the needs of CPSA.

### **Modifications**

CPSA reserves the right to issue addenda or amendments to this RFP.

### **Proposal Submission**

To be considered, all proposals must be submitted in the manner set forth in this proposal. It is the proposer's responsibility to ensure that its proposal arrives on or before the specified time.

### **Incurred costs**

This RFP does not commit CPSA to pay any costs incurred in the preparation of a proposal in response to this request and proposer agrees that all costs incurred in developing its proposal are the proposer's responsibility.

### **Negotiations**

CPSA may require the firms selected to participate in negotiations, and to submit cost, technical, or other revisions of their proposals as may result from negotiations.

### **Final Authority**

The final authority to award contracts as a result of this RFP rests solely with CPSA.

## **Contact Information**

All inquiries should be directed to the following individual:

Joyce Realon, Payroll and Accounting Coordinator  
College of Physicians & Surgeons of Alberta  
2700, 10120 – 100 St NW  
Edmonton, AB T5J 0N3  
Email: [joyce.realon@cpsa.ab.ca](mailto:joyce.realon@cpsa.ab.ca)  
Phone: 780-401-0978

Please contact Joyce for an excel version of the vendor checklist.



## Appendix A

### Services/Features Detailed Description

Table 1: Time & Attendance Management Software

Time & Attendance Management Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>System administration:</b>	<p>Set up employees with various time off categories based on the type of employee.</p> <p>Various employee types (part-time, full-time, 7 hours vs 8 hours/day, short-term contract, long-term contract, etc.)</p> <p>Various classifications of schedules (vacation schedules, Personal Time Off, etc.)</p>		
	<p>Pro-rate entitlement for time off categories</p> <ul style="list-style-type: none"> <li>- Employment starting or terminating mid-month</li> <li>- Time off entitlement based on customizable rules.</li> </ul>		
	<p>Generate the monthly allotment of Personal Time Off (PTO) to be populated in each applicable employee’s bank based on the # of days/hours worked in the month. Certain time off codes reduce the eligibility for PTO in that month.</p> <p>Personal Time Off can accumulate to a maximum of three months accumulation.</p>		
	<p>Enter standard company paid days for all employees and employee groups. Example: Christmas, other company paid days.</p> <p>When employees book their time off, the calculations for days used would exclude company paid days.</p>		

Time & Attendance Management Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>Booking time off:</b>	<p>Allow employees to enter time off bookings for the current and 1 future year.</p> <p>Employees can see the banked time available, and considers future bookings already entered.</p>		
	<p>Black-out dates: Identify customization blackout dates for various groups of employees.</p> <p>Example: If one staff member in a department has already booked time off for a specific date, then that date is blocked against the other staff member(s) who would like to book the same date(s).</p> <p>Mini-groups of staff will be required in some departments.</p>		
	<p>Employees to be able to see time off for customized groups of CPSA staff.</p> <p>Employees cannot see the time off category entered by other employees.</p>		
	<p>All CPSA staff can see all booked dates for the entire company (not department-specific).</p> <p>The calendar viewed by all staff, only shows time booked off (not they type of time). Administrators will be able to view the type of time booked off.</p>		
	<p>Whenever staff book time-off, the booked date automatically populates in the employee’s MS Outlook calendar.</p>		
<b>Time off approvals:</b>	<p>CPSA will have different categories of time-off bookings such as Vacation, Personal, Sick Days, etc. We want</p>		

Time & Attendance Management Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	specific categories of bookings to be automatically approved while the remaining categories would require approvals from managers/supervisors.		
	The individual staff member and their supervisor(s) automatically get email notifications whenever time is booked, changed, or cancelled.		
<b>Time sheets required for some positions:</b>	The system automatically sends out a reminder email to applicable CPSA staff, 6 business days prior the processing of payroll, to fill-in and submit their timesheets if not already submitted.		
	<p>Applicable employees to enter total number of hours worked each day.</p> <p>Not all part-time employees have standard schedules.</p> <p>Salaried employees do not fill out timesheets.</p> <p>No scheduling of staff is required.</p>		
	Ability to track overtime hours with the option to be banked or to be paid out as per Alberta Employment Standards.		
<b>Approval of time sheets:</b>	All time sheets to be approved by supervisor.		
	Overtime worked (whether banked or paid out) is to be approved and linked to the payroll module as applicable.		
<b>Reporting:</b>	Ability to view time off details or balances into reports with the functionality to export to excel.		
	The flexibility to pull various data fields into customized reports, normally into an excel format.		

Time & Attendance Management Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	The system automatically generates an “overage” report on a monthly or ad hoc basis particularly for vacation and overtime.		
	Tracking of days away for disability management.		
<b>Audit trail function:</b>	The system provides an audit trail function/report, for both employee entries and administrative changes.		
	The system has strong general and system controls in order to secure the confidentiality of CPSA staff personal information.		
<b>Self-service concept for employees:</b>	Employees can see balances in their time off accounts at current date and future dates: <ul style="list-style-type: none"> <li>- Vacation</li> <li>- Personal time off</li> <li>- Sick/general illness</li> </ul>		

Table 2: HR Software

HR Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>Applicant tracking:</b>	The system has Recruiting/Hiring features including:		
	- ability to build and save job postings templates, and attach recruiting profiles		
	- ability to upload profile to recruiting platform (external job posting boards)		
	- ability for managers/directors to see the progress of the hiring process (applicant tracking feature)		
	- ability to track internal vs external candidates		
	- applicant tracking feature that will move applicants from one phase to another		
	- ability to track the employee from applicant to hiring		

HR Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	and on boarding through to departure.		
	Reminder email notices sent to applicants for interviews		
	The system pre-populates information from resumes during the onboarding process.		
	The system tracks submitted resumes that does not tie to a specific job-posting for future reference.		
	The system ranks submitted resumes according to a specified criteria that we can customize. We can further rank the resumes as needed.		
<b>Onboarding:</b>	Successful applicant information to be transferred to onboarding module and the employee database (self-serve module).		
	The system allows information to flow through to the payroll system automatically, to avoid re-entering data.		
	Ability to load forms/documents, videos and links for onboarding employees		
	The system will send reminder notices to applicable parties for onboarding activities.		
<b>Performance Management:</b>	The system has customizable performance management features: <ul style="list-style-type: none"> <li>- goal setting and tracking</li> <li>- feedback mechanism</li> <li>- performance reviews</li> <li>- managing poor performance framework</li> </ul>		
	The system has recognition tools/ platform.		

HR Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>Self-service concept for employees:</b>	The system has the ability to track/extract information from a staff’s resume. <ul style="list-style-type: none"> <li>- Employee skills</li> <li>- Education</li> <li>- Experience</li> <li>- Professional development</li> <li>- Other</li> </ul>		
	The system allows employees to update/see certain types of their HR-related information. <ul style="list-style-type: none"> <li>- Employee skills</li> <li>- Education</li> <li>- Experience</li> <li>- Professional development</li> </ul> Ability to add other customizable fields.		
	Ability for employee to view current and historical compensation, position/classification, supervisor information.		
	Ability for employee to generate standard letters (i.e. employment verification letters) and can be saved in an employee file		
<b>Reporting:</b>	An electronic organizational chart is generated with a visual/picture to demonstrate hierarchy for various approvals (allow for multiple hierarchy streams)		
	The system allows reporting in all HR services with the ability to customize, and the ability to export data.		
<b>Employee survey capability:</b>	The system has the ability to conduct employee surveys.		
<b>Letter-writing (merge capability) feature:</b>	The system has a letter-writing feature for standard HR correspondences and would also allow us to customize any letters appropriate for CPSA staff.		
<b>Learning Management System:</b>	The system can generate invitations to training sessions		

HR Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	The system can record and maintain history of training taken by employees		
	The system can host CPSA training links to online training sessions		
	The system has an approval process built in for taking courses with costs associated/budget implications		
<b>Audit trail function:</b>	The system provides an audit trail function/report, for both employee entries and administrative changes.		

Table 3: Payroll Software

Payroll Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>Electronic employee files:</b>	The system stores submitted employee file information such as parking/fitness receipts, email correspondence for changes in information, etc., electronically.		
<b>New hires:</b>	The system can send out payroll forms/ correspondences/ links.  When the forms are returned, a task is prepared for the payroll team. The form is filed in the electronic employee file.		
	Employees may initiate a request or submit a form which is forwarded to payroll to process. The request/ correspondence is filled in the employee file.		
<b>Process payroll:</b>	Process semi-monthly payroll for hourly and salaried employees.		
	Pull time details from the Time & Attendance module.		
	Calculate statutory holiday pay as per Alberta Employment Standards.		

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Payroll Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	Receive and track employee submissions of internal benefits such as parking and fitness reimbursements, etc.		
	Allow for employee miscellaneous payments some taxable and some non-taxable.		
	Allow employee deductions for <ul style="list-style-type: none"> <li>- fixed deductions based on dollar amount or % amount for each pay.</li> <li>- Ad-hoc deductions each pay.</li> </ul>		
	Import retirement saving plan(s) deduction detail for each pay period.		
	The payroll system is compatible with our Accounting System (Microsoft Dynamics GP 2016) for reporting and journal entry purposes. Summary journal entries can be imported into GP.		
<b>Pay stub:</b>	The pay stub includes a breakdown of the type of pay dollar amount/days included in the paystub (e.g. vacation, sick, overtime, statutory holiday pay, etc.).  The pay stub includes all required information as per Alberta Employment Standards.		
	The pay stub is posted in the Employee portal.		
<b>Pay period/Monthly/year end remittances:</b>	Government remittances are calculated and summarized.		
	Government remittances and deductions are remitted to CRA.		
<b>Audit trail/reporting functionality:</b>	The system has an audit trail function/reporting capabilities for any changes in employee card information		
<b>Reporting and analytics features:</b>	The system generates standard reports, and also be flexible enough to be customized according to		



Payroll Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
	CPSA’s payroll needs.		
	Ability to generate ad-hoc reports from payroll fields.		
	Ability to have data pulled for importing to BI360 data warehouse.		
	Ability to generate .txt files for pension demographic details for CPSA’s record-keeper.		
	Ability to generate .txt files for pension contribution details for each pay period for CPSA’s record-keeper.		
	If payroll software is installed on CPSA servers, the ability to generate EFT bank files compatible with Canadian banks.		
	The ability to track balances in various benefit categories for payroll administration and self-service access by employees.		
<b>Payroll administration:</b>	<p>Post other payroll related documents to the appropriate employee portal. Examples:</p> <ul style="list-style-type: none"> <li>- Compensation statement</li> <li>- Annual pension letter</li> <li>- Ad hoc documents</li> <li>- T4</li> </ul> <p>Some documents are prepared in a batch format that needs to be broken down by employee.</p>		
	Calculate and produce T4, T4A, T4A-NR for employees		
	Calculate and produce T4, T4A, T4A-NR for CPSA committee members from imported file from GP. (Non-employees paid through accounts payable.)		
	Calculate and remit record of employment (ROE). File a copy of the ROE in the employee’s electronic file.		

Payroll Software – Services/Features	Details	YES or NO	Additional Notes/Description from the vendor
<b>Employee portal/ Self-service feature:</b>	<p>Allow staff to see and change certain types of their payroll-related information.  Example:</p> <ul style="list-style-type: none"> <li>- Home address</li> <li>- Personal email</li> <li>- Personal phone</li> <li>- Emergency contact(s)</li> <li>- Links to benefit provider web sites</li> </ul> <p>Allow staff to access their payroll related documents:</p> <ul style="list-style-type: none"> <li>- Pay stubs</li> <li>- T4 slips</li> <li>- Total compensation statement</li> <li>- Annual pension letter</li> </ul> <p>Payroll is notified of changes.</p>		
	<p>Ability for employee to access payroll forms/links, submit and upload to payroll to action.  Example:</p> <ul style="list-style-type: none"> <li>- Change in benefits</li> <li>- Change in dependents</li> <li>- Name changes</li> <li>- Banking information</li> <li>- Change in marital status</li> <li>- Change in beneficiaries</li> <li>- Request leaves of absences</li> </ul> <p>Payroll form(s) to be filed in employee electronic file.</p>		
<b>Electronic work flows for payroll team:</b>	<p>The system tracks work flows for CPSA payroll staff for payroll related forms/ requests submitted.</p>		