



## RFP #17-14 Questions & Answer

### Scanning/Indexing

**Question:** Please clarify if BJCTA is seeking the vendor to set up a structured process BJCTA can use to scan and index the 350 employee personnel files into the system, or if BJCTA is requesting that the vendor perform the actual scanning and indexing work too.

**Response:** The vendor will scan/index the initial 350 files and BJCTA will handle all scanning thereafter.

### Forms/Workflow

**Question:** Please expand on the document submission workflow referenced in Scope of Services (2.) Specifically, describe the submitters to this process and the approval flow it follows.

**Response Submission:** of any HR form (i.e. Performance Evaluation, Disciplinary Action Form, Personnel Change Notice, 4<sup>th</sup> form to be determined) Forms will be submitted by manager and routed to next level manager and HR for approval. Some documents will require 2 levels of management approval along with HR's approval.

**Question:** Please provide details and/or sample forms for the 4 forms/workflows referenced in Scope of Services (3.d). It is difficult to commit to a specific implementation timeline without a greater level of detail on the workflows and forms we have to configure and test.

**Response:** Disciplinary Action Form and Personnel Change Notice are attached (See 3<sup>rd</sup> page).

### Records Management

**Question:** Are BJCTA's HR personnel files subject to state or federal records retention schedules? If so, does BJCTA need formal records management functionality with record cutoffs, dispositions, legal holds/freezes, etc.?

**Response:** Yes and yes.

### Timeline

**Question:** Does BJCTA have a specific implementation deadline date?

**Response:** Must be live by mid-September, prior to moving into the new facility

**Question:** How many user will need to access the Document Management System on a daily basis? Will these users need read-write access? If so, how many? Will any users need read-only access? If so, how many?

**Response:** Up to 15 will need access to submit workflow forms. About 5-6 users for read-write access. Read only access might be valuable in the future if we expand to managers, but not on the initial rollout.

**Question:** Is there an HR application that the system will need to integrate with for data syncing? If so, does that application run on a SQL/Oracle database or offer a web service API? Would data syncing need to occur in real time or can updates be uploaded to the system nightly?

**Response:** No HR system to sync with.

**Question:** What are the 6 subsections of an employee file? How many document types are there for an employee file?

**Response:** Files are currently being redesigned. As of now, the subsections are pre-employment, post-employment, performance, training, benefits, and misc. As far as number of document types, this number is unknown since documents have changed numerous times over the years.

**Question:** I did have a couple questions. For the 350 files to be scanned what is the estimated document count? My assumption is the “document” is the same as a file subsection. Each file has 6 subsections. Pages in each subsection are undeterminable. As to the four workflow/eform solutions can you provide more details as to the requirements and routing process of these workflows?

**Response:** Submission of any HR form (i.e. Performance Evaluation, Disciplinary Action Form, Personnel Change Notice, 4<sup>th</sup> form to be determined) Forms will be submitted by manager and routed to next level manager and HR for approval. Some documents will require 2 levels of management approval along with HR’s approval.



# BJCTA PERSONNEL CHANGE NOTICE (PCN)

## Employee Profile

Employee:

Employee Number:

Hire Date:

Seniority Date:

## New Hire / Rehire

Hire Type:

Time  
Type:

Employment  
Type:

Job Title:

Department:

Pay Grade:

FLSA  
Status:

Salary:

Start Date:

End Date (If Temporary or and Intern):

Position Type:

Replacing:

## Position Change

Change Type:

Effective Date:

Current Job  
Title:

New Job  
Title:

Current Dept:

New Dept:

Current Pay  
Grade:

New Pay  
Grade:

Current Salary:

New  
Salary:

Current FLSA  
Status:

New FLSA  
Status:

Current Time  
Type:

New Time  
Type:

## Compensation Change Only

Change Type:

Effective Date:

Reason:

Current Salary:

New Salary:

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## Terminations

Termination  
Type:

Effective Date:

Reason:

Eligible for  
Rehire:

If No,  
Explain:

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Employee  
Comments:

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor/Department Head Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director of Human Resources Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Executive Director/Chief of Staff Signature

\_\_\_\_\_  
Date