



Basic Company Information

Contact Information		
Company Name:		
Company Main Address:		
Company Main Contact:	Phone Number:	Email:
Pay Period Profile (please highlight all that apply)		
Weekly	# of Weekly Pay Cycles:	Starts on: SUN MON TUE WED THU FRI SAT
Bi-Weekly	# of Bi-Weekly Pay Cycles:	Starts on:
Semi-Monthly	# of Semi-Monthly Pay Cycles:	Starts on: and ends on
Monthly	# of Monthly Pay Cycles:	Starts on:
Custom	# of Custom Pay Cycles:	Starts on: and ends on Starts on: and ends on Starts on: and ends on Starts on: and ends on (or provide attachment of pay period dates)
Holidays and Time Off		
1. Please provide a list of holidays you observe.		
Cost Centers and Jobs		
1. How many physical locations do you have?		
<i>a. Please supply a list of your locations.</i>		



2. Do you have Departments, Divisions, Jobs, etc.?	
<p style="text-align: center;"><i>a. Please supply a list of the above.</i></p>	
3. Please list your company's Jobs.	
For each Job, please indicate the following:	
a. Abbreviation, Job Code.	
b. Is this job available for Applicant Tracking?	
c. Is this job available only to Applicants (i.e. cannot be assigned to employees of the company)?	
d. What type of employee has this job? <i>Ex. Consultant, Exempt, Non-Exempt.</i>	
e. What is the EEO Classification for this job? <i>Ex. Administrative Support Workers, Professionals, Technicians, etc.</i>	
f. What is the Union associated to this job?	
g. What is the Pay Grade for this job?	
h. What of the above can be overridden at the employee level?	
i. Have you completed Salary Surveys for this job?	
<ul style="list-style-type: none"> - If so, please list the survey name. 	
<ul style="list-style-type: none"> - What was the survey date? 	
<ul style="list-style-type: none"> - What is the Min \$? 	
<ul style="list-style-type: none"> - What is the Max \$? 	
<ul style="list-style-type: none"> - What is the Market \$? 	
j. What Competencies are required of this job?	
E-mail Notifications	



A wide array of e-mail notifications can be automatically generated for both employees and managers / supervisors / administrators according to your needs.

Notifications can be sent for categories such as an employee (Ex. birthday, anniversary), accruals (Ex. negative balance), employee timesheet (Ex. approved, submitted), feedback (ex. added), manager timesheet review (Ex. pay period end reminder), pay period (Ex. locked), points, system (Ex. new system event), time off requests (Ex. approved, rejected) and timesheet change requests (ex. approved, rejected).

Below is a list of the most commonly used e-mail notifications. Please highlight all notifications you would like to implement. If you are interested in any other notifications please list them in the Other category.

To Employee or Manager

- Anniversary approaching
- Birthday approaching
- Performance Review Initiated / Rejected / Finalized
- Benefit Change Request Approved / Rejected / Completed
- Open Enrollment Start / End
- Other:



Benefits

Benefit Types					
Please check all Benefit Types your company offers.					
Basic AD&D	Basic Life	Dental	LTD		
Medical	STD	Supplemental AD&D	Union		
Vision	Other (please list):				
Life Change Event Types					
Please check all Life Change Events your company offers.					
Birth / Adoption	Change in Spouse Employment Status	Changes in Partnership	Death of Dependent		
Dependent Enters / Leaves United States	Divorce / Legal Separation	Leave of Absence	Marriage		
Newly Eligible	Position Change	Retirement	Termination of Eligibility		
Turning 65 (Actively Employed)	Other:				
Benefit Plans					
For each Benefit Type, please indicate the following:	Name of Plan 1	Name of Plan 2	Name of Plan 3	Name of Plan 4	Name of Plan 5
1. Please list Provider Name and Website.					
2. Certificate #.					
3. Policy #.					
4. Who is eligible for this Benefit Plan?					
5. What is the waiting period associated to this Benefit Plan, if any?					



6. What Earning/Deduction Code is this Benefit Plan tied to?					
7. How often is this Earning/Deduction paid?					
8. How many Coverage Levels do you offer? Please list. Ex. Employee, Employee & Spouse, Employee, Employee & Children, etc.					
9. Please define pricing structure for each level.					
10. Will your employees go through open enrollment?					
a. If yes, when does open enrollment begin / end for the next year?					
b. What warning message should display if the employee exits open enrollment without submitting their selections?					
c. What instructions do you want to provide your employees?					
d. What message should display when the employee confirms their selection?					
e. What message should display when the employee has finalized their selections?					
f. Please list any other messages you would like to display to your employees during open enrollment?					

Education and Training

Education Levels			
1. Will you be tracking the Education Level of each employee?			
a. If yes, please check the applicable Education Levels for your employees.	High School	Technical Diploma	Associates Degree
	Non-Degree Program	Bachelor's Degree	Master's Degree
	Doctorate Degree	Other:	



Degree Types						
2. Will you be tracking the type of Degree for each employee?						
a. If yes, please check the applicable Degrees for your employees.	General Equivalency Diploma	High School Diploma	Associate of Applied Science			
	Associate of Arts	Associate of Science	Bachelor of Arts			
	Bachelor of Science	Graduate Record Exam	Master of Business Administration			
	Master of Education	Master of Science	Master of Arts			
	Doctor of Medicine	Doctor of Philosophy	Doctor of Education			
	Juris Doctor	Other:				
3. Do you offer your employees training, job related or other? Please list the types of training you offer.						
a. If yes, please list the courses made available to your employees. <i>Ex. CPR Training, Sexual Harassment Training.</i>						
For each of the courses above, please indicate the following:		Name of Course 1	Name of Course 2	Name of Course 3	Name of Course 4	Name of Course 5
a. Are employees taught externally, internally or are they employee self-study?						
b. What is the cost to the company?						
c. What is the cost to the employee?						
d. How many CEU's (Continuing Education Credits) are offered?						
e. What is the renewal term? <i>Ex. Annual.</i>						
4. Are employees required to take certain courses based on their job or employee type? <i>Ex. Nurses must be CPR certified.</i>						



<p>a. If yes, please list the courses required under each job type. This will allow us to create profiles that can be assigned to groups of employees with their applicable courses. <i>Ex. Nurses must take CPR and First Aid courses. Drivers must take CDL courses.</i></p>					
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Applicant Tracking and Recruitment

Applicant Tracking			
1. Will you be tracking the candidates who apply for jobs in your company?			
a. If yes, please list the referring sources, if applicable. <i>Ex. Company Website, Internal Employee, etc.</i>			
b. Please check the applicable stages each applicant will follow through your hiring process.	Resume Received	Screen Candidate	Interview Candidate
	Candidate Not A Fit	Extend Offer	Offer Declined
	Offer Accepted	Perform Background Checks	Onboarding
	Hired	Other:	
c. When an applicant is created in the system, what should their default stage be from the list above?			
d. When an applicant is hired in the system, what should their default stage be from the list above?			
Recruitment			
1. Are you looking to create job posting in the system that will allow you to post links on your company website and external sources that allow applicants to click and apply for jobs online? <i>NOTE: There are additional fees for usage of this functionality.</i>			
a. If yes, please supply the list of jobs you are hiring for.			
For each job above, please indicate the following:			



<p>b. Please list the job categories that apply. Ex. Marketing Intern – Advertising, Public Relations, etc.</p>	
<p>c. Please list the industry applicable to that job. Ex. Marketing Intern – Software, Technology, etc.</p>	
<p>d. Please list the type of job it would be. Ex. Full-Time, Part-Time, Intern, Seasonal, etc.</p>	
<p>e. Please list the required minimum and maximum years of experience.</p>	
<p>f. Please list the degree required.</p>	
<p>g. Please list the percentage of travel required.</p>	
<p>h. Please list whether or not this job will manage other employees (Yes or No).</p>	
<p>i. Please list the Base Pay, Bonus, Commission and any other compensation.</p>	
<p>j. Will the company pay relocation expenses?</p>	
<p>k. Who is the hiring manager? Please supply Name, Phone and Email Address.</p>	
<p>l. Please list a description of the job.</p>	
<p>m. Please list requirements of the job.</p>	

Disabilities and Incidents

<p>Disabilities</p>	
<p>1. Will your company be tracking whether an employee is on disability?</p>	
<p>a. If yes, please list the types of disability you will be tracking. Ex. Back Injury, Car Accident, etc.</p>	
<p>b. Please list any restrictions for the disability types above.</p>	



Incidents	
1. Will you be tracking incidents that occur on while the employee is at work? <i>Ex. Workplace Violence, Sexual Harassment, Injury.</i>	
a. If yes, please list the resolutions associated to those incidents. <i>Ex. Employee Counseling, Suspension, Termination.</i>	
b. Please list the violations associated to each incident. <i>Ex. Employee Handbook – Section IV.</i>	

Pay Grades

1. Will you be tracking Pay Grades?					
a. If yes, please list each Pay Grade level.					
b. Are there steps within each Pay Grade?					
For each Pay Grade above, please indicate the following:	Name of Pay Grade 1	Name of Pay Grade 2	Name of Pay Grade 3	Name of Pay Grade 4	Name of Pay Grade 5
a. What is the Minimum Effective Hourly Rate?					
b. What is the Maximum Effective Hourly Rate?					

Performance Reviews

Competencies					
1. Please list the Competencies your company uses to measure performance, if applicable. <i>Ex. Customer Service Skills.</i>					
For each of the Competencies listed above, please indicate the following:	Competency 1	Competency 2	Competency 3	Competency 4	Competency 5
a. Please list a description of each Competency.					
b. Is there a different weight associated to Competencies vs. other review items? Please describe.					



c. Are individual Competencies weighted differently?					
Core Values					
1. Please list the Core Values of your company used to measure performance, if applicable. <i>Ex. Teamwork, Collaboration, etc.</i>					
For each of the Core Values listed above, please indicate the following:	Core Value 1	Core Value 2	Core Value 3	Core Value 4	Core Value 5
a. Please list a description of each Core Values.					
b. Is there a different weight associated to Core Values vs. other review items? Please describe.					
c. Are individual Core Values weighted differently?					
Goals					
1. How many Personal Goals will each employee have?					
2. Who can add Personal Goals? <i>Ex. Employee, Manager, etc.</i>					
3. Please list the Company Goals used to measure performance, if applicable. <i>Ex. Increase revenue by 20%. NOTE: Personal Goals can be defined per employee performance review.</i>					
For each of the Company Goals listed above, please indicate the following:	Company Goal 1	Company Goal 2	Company Goal 3	Company Goal 4	Company Goal 5
a. Is there a different weight associated to Company Goals vs. other review items? Please describe.					
b. Are individual Company Goals weighted differently?					
c. Are Personal Goals weighted differently than Company Goals?					
Ratings					
1. How are employees rated? <i>Ex. Grade – A, B, C, D, etc.; Points – scale of 1 – 10, etc; Outstanding, Satisfactory, Poor, etc.</i>					



<p>a. If graded, does each rating have a range associated to it? <i>Ex. A = 90-100, B = 80-89, etc.</i></p>	
<p>2. Do the ratings vary per Performance Review item? <i>Ex. Goals are rated on a Point scale while Core Values are graded.</i></p>	
<p>Reasons</p>	
<p>1. Please list the reasons your company holds reviews. <i>Ex. 90 Day Review, Annual Performance Review, Disciplinary Review.</i></p>	
<p>Review Policies</p>	
<p>1. What is the anchor date for your company's reviews? <i>Ex. Employee's Hire Date, January 1st, etc.</i></p>	
<p>2. How often do reviews occur? <i>Ex. Annual, Quarterly, Monthly.</i></p>	
<p>3. When does the employee's first review occur? <i>Ex. 90 days from Hire date.</i></p>	
<p>4. When do reviews end, if applicable? <i>Ex. Employee no longer reviewed after 10 years of employment.</i></p>	
<p>5. How are grades given per review item? <i>Ex. Points Totaled vs. Average Score.</i></p>	
<p>6. How are final grades calculated? Please check one. Calculated – final grade is a total of points earned. <i>Ex. A-</i> Calculated (Numeric) – final numeric grade is a total of points earned. <i>Ex. 91%</i> Selected – final grade is chosen for the employee by manager. Selected (Numeric) – final numeric grade is chosen for the employee by manager. Entered – no calculations are done, grade is manually entered.</p>	
<p>7. Who should be able to see Ratings within the review? Please check one. All - everyone involved in the review process. Yours – user can only see their own ratings. Prior Only – user can only see their own ratings and the ratings of those before them in the process.</p>	
<p>8. Who should be able to see Comments within the review? Please check one. All - everyone involved in the review process. Yours – user can only see their own ratings. Prior Only – user can only see their own ratings and the ratings of those before them in the process.</p>	



<p>9. Who should be able to view the employee's compensation within the review? Please check one. Finalizer Only – only visible to user who finalizes the employee's review. Manager – only visible to user who is the manager of the employee being reviewed. All Except Employee – visible to all review participants, except the employee. All – visible to all review participants.</p>	
<p>10. Who should be able to view the review summary? Please check one. Finalizer Only – only visible to user who finalizes the employee's review. Manager – only visible to user who is the manager of the employee being reviewed. All Except Employee – visible to all review participants, except the employee. All – visible to all review participants.</p>	
<p>11. Who should be able to view the review results? Please check one. Finalizer Only – only visible to user who finalizes the employee's review. Manager – only visible to user who is the manager of the employee being reviewed. All Except Employee – visible to all review participants, except the employee. All – visible to all review participants.</p>	
<p>12. What does the review effect? Please check all that apply. Account Status – Ex. Active vs. Terminated. Bonus Compensation Cost Centers / Department / etc. Job Title Manager</p>	
<p>13. If the review has effects (indicated above), who is able to make these changes? Finalizer Only Manager All Except Employee</p>	
14. Can a review be rejected?	
a. If yes, are comments required?	
15. Can reviews be anonymous?	
<p>a. If yes, who are the reviews anonymous to? Please check one. To Reviewed To Non-Manager To All Except Finalizer To All</p>	
16. If bonuses are awarded, are they entered or a percentage of the employee's total bonus pool?	
17. Can employees review themselves?	



18. Are ratings required?	
19. Are comments required?	
20. Please describe the workflow of the review. <i>Ex. Employee reviews self, Manager Reviews Employee, Admin Finalizes Review.</i>	

Asset Tracking

1. Please list the types of Assets your company is interested in tracking.	Computer	Furniture	Cell Phone
	Software	Uniform	
	Other:		
2. Are you looking to track company or personal vehicles?			

Unions

1. Please list the union and union representative associated to your company.	
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