CHARTER IMPACT

Payroll/HRIS System Proposal

NEW SCOPE WITH INOVA PARTNERSHIP
Added Services are in GREEN

EMPLOYEE RECRUITING & ONBOARDING *(Optional)*
1. **Provide a system for schools to electronically manage new hire onboarding (including mobile or online self-service options)**
2. **Create an employee self-service portal to reduce manager/HR time and paperwork**
3. **Electronically store all required HR forms**
4. Complete required compliance documentation such as:
   a. CALPADS staff demographic information form
   b. W-4 form and instructions
   c. DE-4 form and instructions
   d. I-9 form and instructions
   e. Direct deposit form
   f. Employment contract

HUMAN RESOURCES & BENEFITS *(Optional)*
1. **Establish single database for all employee data, including the ability to**
   a. **Provide paperless documents & forms management**
   b. **Provide employees with HR-related email notifications and reminders**
   c. **Create customizable reporting and analytics (including People Insights Analytics for benchmarking)**
2. **Establish employee & manager self-service online portal for easy access to edit and track demographics, pay (e.g., stipend), certification, and other changes**
3. **Establish automated workflows & notifications for all processes**
4. **Provide open enrollment and qualifying events to employees to electronically manage open enrollment and qualifying events**
5. **Establish direct link to health care providers to electronically submit changes**
6. **Provide talent management, including performance reviews and incident tracking**

TIME & ATTENDANCE
1. Create customized time and attendance rules through a variety of options:
   a. Time entry
   b. **Mobile and/or online time punches**
   c. *Physical time clocks (equipment charge applies)*
   d. **Electronic sick, vacation, and PTO requests**
2. **Accurately track and calculate requirements for CA labor law (e.g., meal break penalties)**
3. **Pre-program holiday and vacation breaks**
4. **Provide leave management support**
5. **Utilize single database to house Time and HR systems**
6. **Track and report sick, vacation, and PTO balances**

PAYROLL PROCESSING
1. Maintain employee static pay information in a payroll database
2. Set up employee cost coding to ensure SACS code compliance
3. Process status updates, new hires, terminations, and/or informational changes in payroll

system

4. Assist in the development of a regular payroll schedule that is compliant with State labor laws and consistent with employee contracts
5. Process regular scheduled payroll and provide direct deposits, paper checks
6. Process supplemental payroll runs including:
    a. Involuntary terminations - checks will be prepared ahead of time and provided to the school on the termination date
    b. Voluntary terminations without notice - checks will be prepared and delivered to employee within the time frame required
    c. Scheduled bonuses/stipends
    d. Additional unscheduled/emergency payroll runs
7. Process and pay all federal and state payroll tax payments according to required guidelines
8. Prepare the state payroll tax filing report annually, and quarterly for federal and state agencies
9. Prepare, review, and distribute W-2s to all employees
10. **Provide check stock to support onsite check printing (if requested)**

RETIREMENT REPORTING
1. Create reports and submit to the County by the due date assigned
2. Work directly with the County and CalSTRS / CalPERS on questions and required supplemental reporting such as:
    a. F496 files to SEW (if applicable)
    b. CalPERS contributions directly in the CalPERS website
    c. Newly elected or mandatory qualified members into the CalSRS website
    d. New appointments for CalPERS members (newly elected or modifications)
    e. Entries and corrections from payroll through the CalPERS (Public Employees' Retirement System) and CalSTRS (State Teacher's Retirement System)
3. Ensure all STRS and PERS payments are made before the due date via ACH, EFT, or Check.
4. Provide ongoing updates to Client staff regarding:
    a. Processes and procedures related to pension programs
    b. Changes to eligibility and classification
    c. Compensation Limits
    d. Rate changes
5. Monitor and manage CalSTRS, CalPERS and CROWE audits
6. Manage internal audits, corrections, and reconciliations of pension plan input
7. Process 403(b) retirement plan deductions, if applicable, submit payments to the third-party administrator in compliance with State and Federal laws

GENERAL SUPPORT
1. Provide support and assistance with creation of internal processes and procedures, forms and tracking systems
2. Provide assistance and project leadership with payroll audits
3. Provide training on internal payroll processing as necessary
4. Proactively provide notification on minimum wage changes, new leave benefits, Ed Code, retirement laws and other payroll regulations.

CURRENT PRICING STRUCTURE

- Payroll processing and retirement reporting - $100 base plus $2.75 per employee per pay period
- Garnishment reporting - $2.50 per occurrence
- New employee reporting - $3.50 per occurrence
- Payroll delivery via FedEx - $35.00 per occurrence, per 50 employees
- Quarterly/Annual Reporting - $20.00 per occurrence
- Form W-2 - $5.75 each
- AATRIX late processing fees – based on a reimbursement of fees charged by AATRIX for priority processing of tax payments.

NEW PRICING STRUCTURE

- CI Tier 1 + Inova Tier 2 payroll and retirement service support - $8.00 per employee per month
- Time and payroll processing software - $9.00 per employee per month
- HRIS - $6.00 per employee per month
- Onboarding - $2.00 per employee per month

COST COMPARISON

School	CI + Inova Proposed (PEPM)			
	CI Processing	Inova Payroll / Time Software	Inova HRIS Software	Inova Onboarding & Recruiting Software
CA Connections	$8.00	$9.00	6.00	$2.00

Total cost for CI service and Inova software and support is $25 PEPM for full suite of Inova/UKG modules.