Amendment 1

RFP - Oracle Implementation Partner

Deadline: January 7, 2025, at 2 p.m. CST

Elizabeth Black, Purchasing Agent

Request For Proposal
Implementation Partner for Oracle HCM Cloud
Amendment 1

Revised Scope

On 10/17/2024, Montgomery County issued an RFP for the implementation of several modules within Oracle HCM. After reviewing the responses and evaluating our resources, we have determined that we need to modify the original scope of the RFP. We believe that Oracle HCM must be implemented in 3 phases.

Phase 1:	Core HR, Oracle Recruiting Cloud, Oracle Learning Cloud, and Oracle Guided Learning
Phase 2:	Oracle Health and Safety, Oracle Guided Learning for Health and Safety
Phase 3:	Absence Management, Oracle Time and Labor, Payroll, Benefits, Oracle Integration Cloud, Oracle Guided Learning for these modules

During each phase of the implementation, the System Integrator is required to perform the number of mock conversions required to ensure that all data has been converted accurately. The County and the System Integrator will agree upon the estimated mock conversions anticipated for each phase. Conversion activities will include, but are not limited, to the following:

1) Planning
2) Data Cleanup Approach and Execution
3) Data Mapping Review
4) Specification Review
5) Validation and Testing

The System Integrator is required to test all configuration, modifications, interfaces, and data conversions during each phase prior to submittal to the County for testing. The System Integrator is responsible for the following test plans:

1) System Test Plan
2) User Acceptance Plan
3) Parallel Testing Plan
4) Payroll Parallel Testing Plan
5) Conversion Plan

Revised Timeline

Tasks	Date
RFP Amendment Release	12/17/2024
SOLICITATION DUE DATE: All proposals must be submitted by this date/time	1/7/2025 2:00 PM CDT
Initial Screening of Technical Proposals	1/13/2025
Notify Finalists for Presentations	1/13/2025
Presentations (Virtual)	1/27/2025 to 1/30/2025
Final Scoring of Technical Evaluations	01/31/2025
Best and Final Offer Issued	01/31/2025
Phase 1 Project Kickoff	03/03/2025

Phase 1 (Target Go-Live July 2025)

a. **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.

b. **Core HR.** Implementation of Core HR including but not limited to configuration of organizational structure, manager and employee 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.

c. **Oracle Guided Learning.** Implementation of Guided Learning in support of deployment of Oracle Recruiting Cloud, Core HR and Oracle Learning Cloud

d. **Oracle Learning Management** – Implementation will include the loading of content from Skillsoft/Biz Library or an integration to Skillsoft/Biz Library. Montgomery County will also like an integration with KnowBe4, however, we are aware that this is not currently supported by Oracle.

e. **Data Conversion.** Core HR Data will be converted using the top of stack methodology. This data will include all active and terminated employees over the last fiscal /calendar year.   Montgomery County will complete all open recruiting requisitions in our current recruiting platform. We will not convert any recruiting data from our legacy platform into Oracle Recruiting Cloud.

f. **Integration of Employee Info into Legacy Payroll –** The legacy payroll allows the importing of employee data. This data is limited to employee demographics. All data associated with the payroll process such as W-4 and payment methods will be manually entered into the legacy payroll. Additional information on the legacy payroll system may be found at https://www.tylertech.com/products/enterprise-erp.

Phase 2 (Target Go-Live December 2025)

 f. **Oracle Health and Safety** – Implementation will include incident and near miss reporting, inspections and follow ups, and integration with our Jira Work Order System for inspection work list assignments. Data may be imported into Jira using a csv file. More information about Jira data importing may be found at https://support.atlassian.com/jira-cloud-administration/docs/import-data-from-a-csv-file. Montgomery County's current risk management software is Compliance Suite. Compliance Suite is using an Access Database as the back end. This software was purchased by Sphera and is most likely slated to be discontinued. Safety inspections are recorded in a free software package, Safety Culture.

 g. **Data Conversion –** Montgomery County has a requirement to maintain data related to an On the Job Inquiry for 30 years, thus, we need to explore converting all historical data (30 years) contained in Compliance Suite. We will need to determine if this will require more data to be loaded into Core HR (historical employees who had an On the Job Injury). The Montgomery County team will be responsible or extracting data from Compliance Suite and will work with the SI to map and load the data into Oracle Health and Safety.

Phase 3 (Target Go-Live January 2027)

 f. **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. Majority of benefits are currently administered by a third-party vendor named Benefits Inc. Benefits Inc is responsible for open enrollment, new hire registration, and life events enrollment.

 g. **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.

 h. **Oracle Time and Labor (OTL)**. Configuration and Implementation including HCM Group Configuration, OTL Rules and Timecard Layouts. Montgomery County would also like to integrate time capture by iOps 360 and Vector Solutions. During the project, Montgomery County will also evaluate the need for time clocks.

 i. **Payroll**. Implementation of Payroll including but not limited to configuration of pay frequencies (biweekly, semimonthly, and yearly), 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. Montgomery County processes payroll for approximately 1500 employees. Montgomery County will not implement Oracle Fusion General Ledger during these three phases. Thus, we will have a need to integrate payroll costing back into the legacy ledger.

 • 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:

  I. Payroll costing was configured and included custom development of a gross to net data extract/report.

  II. 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.

  III. While the County chose one of two options presented and has seen good unit testing results, it does expect the new System Integrator to assess and recommend staying 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.

IV.   While Unit testing was looking satisfactory, there are outstanding fixes (and retesting) at the time of the termination of the previous System Integrator. It is expected that the new System Integrator will address (assuming all parties agree to continue down the current solution path).

f.   **Oracle Integration Cloud** – Used to facilitate and manage integrations between Oracle HCM and iOps 360, Vector Solutions, and Jira Work Order System. May also be used to monitor integrations between Payroll Costing and Munis General Ledger as well as integrations with benefit providers.

j.   **Inbound Integrations to Payroll –** ADP Wage Garnishment via ADP Smart Connect and Compliance Tools, Empower contribution rate modifications for 401K, 457, Roth 401K and Roth 457, possible time entry data from iOps 360(https://iops360.com) and Vector Solutions(https://www.vectorsolutions.com/). Oracle Integration Cloud should be evaluated for use with these inbound integrations.

k.   **Outbound Integrations to Benefit Providers –** These provider integrations have been developed using HCM extracts. These files have been validated by each of the providers for the formatting of the file and the file structure. Testing needs to be submitted with valid data to each of the providers before final sign off on these outbound integrations. Benefit Providers are Blue Cross/Blue Shield of TN(Medical, and Dental/Vision), Guardian (Critical Illness, Accident, and Cancer), Lincoln (basic and voluntary life, long and short term disability), Ameriflex (FSA, parking and transit).

l.   **Tennessee Consolidated Retirement System Outbound Integration –** The extract for this integration has been developed. The data and format have not been validated by the provider.

m.   **Positive Pay File Integration with Regions Bank –** The positive pay file has been developed and the file format has been validated. However, we need to send checks and the positive pay file to the bank for validation.

n.   **ADP Tax and ACA Reporting -** This integration data models and file formats are supplied by ADP. ADP has not validated the files.

o.   **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 the xml data created by the Pay Slip Bursting Data Model. This file is part of the ADP Garnishment process.

p.   **Data Conversion.** Data related to payroll processing and benefits management will be converted from the legacy payroll system and benefits management system (Benefits Inc).

Montgomery County Project Team

- Human Resources - team members provide human capital management, benefits, payroll and time services in addition to learning and recruiting 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. Project management will be a joint effort between Montgomery County IT and the System Integrator.
- Risk Management – team members are responsible for health and safety requirements, guidance and testing.

Additional Information

Please refer to the original RFP for additional information regarding project status, SI expectations and requirements, and configuration specifications. The original RFP may be found here: Original HCM RFP.

The System Integrator should submit pricing by phases and by modules. For example: Phase 1 total price along with the price for each module in phase 1. The System Integrator should also total the pricing at the end of the proposal.