
Sarasota Human Resources/ Payroll System Upgrade Project

Gap Analysis Attachment D To The Master License Agreement

Version 1.0

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Revision History

Name	Date	Reason For Changes	Version
Wayne Milling Julie Grabach Sue Titus	10/6/2008	Initial creation	1.0

1. Introduction

1.1 Purpose

This document is the Gap Analysis Overview for the Sarasota County Schools TERMS to CrossPointe.net Upgrade Project. This document includes direction on how the Gap Analysis has been structured, a Plan Summary and a Detail Section. The first section provides a project introduction, describes how the Gap Analysis Plan fits into the project documentation, and it identifies timelines, participating staff and responsibilities. The second section contains the outcome of gap meetings that were conducted by CrossPointe.net and Sarasota staff.

The target audience of this document is the project management team, including executives and the steering committee, and members of the Sarasota County Schools TERMS to CrossPointe.net Upgrade Project team. This document provides an overview of the process and provides documentation that the team produced as a result of the gap analysis.

The points of contact for comments about this plan and document are the Product Managers, Wayne Milling, Julie Grabach and Sue Titus, and Sr. Account Executive, Stephen Hanner.

1.2 Team and Roles

Due to the breadth, depth, impact and risk of this project many participants are involved in development of the Gap Analysis. The Gap Analysis team is responsible for specific gap tasks for each functional area within the Human Resources / Payroll systems. Individuals who participate on the Gap Analysis project teams provide input and participation on the gap task required for the project. The following is a list of all Gap Analysis participants.

1.2.1.1 CrossPointe Participants

Name	Role
Wayne Milling	Product Manager
Sue Titus	Product Manager

1.2.1.2 Sarasota Participants

Name	Role
Mitsi Corcoran	Chief Finance Officer
Anita Ross	HR Information Specialist
Sally Otto	HR Information Specialist
Roy Sprinkle	Director of HR
Nam Le	Programmer
Roy Pinchin	Systems Analyst
Jackie Lodge	Employment Specialist
Greg Gordon	Web Programmer
April Aitken	Budget Accountant
Bonnie Lyons	Budget Accountant
Joanne Townsend	Director of HR
Haze Saari	Payroll Manager
Various	HR & Payroll Specialists

1.3 Project Timeline

The following are milestones associated with the Human Resources / Payroll System Gap Analysis.

Dates	Purpose
9/8/2008 – 9/12/2008	Gap Analysis Meetings
9/25/2008	Prepare and submit documents to Sarasota for review
10/6/2008 – 10/10/2008	Gap Analysis Review
12/5/2008	Sign-off on Final Version

2. System Features

Development of the Gap Analysis Plan is categorized by functional areas. Each module has been reviewed by the Gap Analysis team and a detailed list of features identified. The following sections list outcomes of the Gap Analysis meetings and are classified as baseline, future enhancements or customizations.

Functionality of existing TERMS application or equivalent will be included as part of baseline features of the CrossPointe .net software solution..

2.1 Applicant Tracking

2.1.1 Baseline Features

2.1.1.1 On Line Applications

2.1.1.1.1 Multiple Type of Application

2.1.1.1.2 Application Builder – Select from the following menus, forms and options

- Demographic/ Contact Information
- Employments Preferences
- Education/Certifications
- Student Teaching
- Work Experience including extracurricular
- General Experience
- References
- Veterans Information
- Required Documents
- Custom Forms (such as security background check)
- Custom Questions
- Affirmative Action (not mandatory)
- Attachments
- Employment Preferences

2.1.1.1.3 Additional documents / Attachments

- Professional Recommendation Form – would like to e-mail these, but also allow them to print a form and hand deliver to a reference
- Security Background Form - will be able to accept that electronically rather than on paper; must be kept confidential (a principal may be able to view the application of their teacher, but not their background forms)

2.1.1.1.4 Entering application – if the applicant stops, he can save the data he entered and it will be available for continuation for 48 hours; if the applicant does not come back to it, data already entered will be purged.

2.1.1.1.5 Application Verification-by section and by required documents

2.1.1.1.6 Gallop scores – Retain History of current scores – discontinuing use of Gallop

2.1.1.1.7 Application Date must be secured - this date is when all parts of the application have been completed (but not put in "recommended")

2.1.1.1.8 No paper applications – all online

2.1.1.1.9 Applications are inactivated after two years

2.1.1.1.10 Applications are purged after four years

2.1.1.1.11 Application approval status

2.1.1.1.12 Application easy to fill out with good flow, clear code selections, context sensitive helps, and email interface to resolve questions by the applicant.

2.1.1.1.13 An optional module will be available to survey Applicant about “Why us”, “ How did you hear about us” , etc.

2.1.1.2 Office Only Capabilities

2.1.1.2.1 Email Capabilities for Letter of Reference

2.1.1.2.2 Passwords should expire after a user specified time

2.1.1.2.3 Integration with hiring process

2.1.1.2.4 Capability to add notes

2.1.1.2.5 Attachment work flow

2.1.1.2.6 Application date rules

2.1.1.2.7 Available in UDR for statistical analysis

2.1.1.2.8 Office approval by “expert” in specific sections

2.1.1.2.9 Ability for Principals to see applications

2.1.2 Future Consideration

None

2.1.3 Sarasota Specific Customization

None

2.2 Processing Positions

2.2.1 Baseline Features

2.2.1.1 Posting – Job Openings

2.2.1.1.1 Job opening will be posted where the opening originated. Once entered it will enter the Workflow process where it can be reviewed, monitored and approved.

2.2.1.1.2 All activity will be recorded and maintained for query and auditing

2.2.1.1.3 Automatic posting to the web based on rules set up by the client

2.2.1.2 Hiring

2.2.1.2.1 "Letter of Intent" - Apply for specific position

2.2.1.2.2 Work flow for routing and approvals

2.2.1.2.3 Interactive Forms

2.2.1.2.4 Letter of intent must be rule based

2.2.1.2.5 "The process should be based on Sarasota's 481/482/486 process with full integration (budget, position control, skills inventory, application)."

2.2.1.2.6 "Unlimited attachments to "" Request for Position Form"" and ""Request for Hire Form"""

2.2.1.2.7 Historical tracking of who put in a letter of intent and the outcome of the request

2.2.1.3 Rules

2.2.1.3.1 Sarasota presently has "Right to Rehire" rules which should be incorporated into the process

2.2.2 Future Consideration

None

2.2.3 Sarasota Specific Customization

None

2.3 Position Control

2.3.1 Baseline Features

2.3.1.1 Interfaces

2.3.1.1.1 Full integration – Need to eliminate multiple data sources, currently Sarasota has some position control data in Terms, some in an Excel spread sheet and some in Lotus. The needs of all departments must be met in one single database. Status and effective date processing will be integral in achieving this objective

2.3.2 Future Consideration

None

2.3.3 Sarasota Specific Customization

None

2.4 Professional Development

The district has developed their own Professional Development software that they would like to keep. The Professional Development system is accessible and updated by Charter Schools and the District's Alternative Centers. The system of record is the AS400 and file transfers have been developed to keep the two databases in sync.

2.4.1 Baseline Features

2.4.1.1 Processing

2.4.1.1.1 The system needs to be able to record professional development information for individuals from outside the district. (Charter School).

2.4.1.2 Interfaces

2.4.1.2.1 Interface must be developed to synchronize data between CrossPointe.net and the District's current Professional development system.

2.4.2 Future Consideration

None

2.4.3 Sarasota Specific Customization

None

2.5 Time and Attendance

2.5.1 Baseline Features

2.5.1.1 Time Requirements

2.5.1.1.1 Interface to Archibus

2.5.1.1.2 Interface with Subfinder for timesheet data

2.5.1.1.3 Track available and usage of FMLA

2.5.2 Future Consideration

None

2.5.3 Sarasota Specific Customization

None

2.6 Employee Profile

2.6.1 Baseline Features

2.6.1.1 Workflow

2.6.1.1.1 Need to develop workflow processes for supplements.

2.6.1.2 Demographics

2.6.1.2.1 The system needs to maintain I 9 data & attachments.

2.6.1.3 Certification

2.6.1.3.1 The district monitors and notifies certificated employees when their certificates are close to expiration (18 months, 6 months, and 3 months). They currently send a memo with a renewal application attached to the employee and the employee needs to send in the check and application to the district office. This process can be expedited with the use of CrossPointe.net's user defined forms and workflow engine.

2.6.1.3.2 Add "Applied" to the certificates screen (this is a date field)

2.6.1.3.3 The district would like to add a status field on the subject certification screen - they would like to track when a certification in a subject matter has been deleted.

2.6.1.4 Education

2.6.1.4.1 The district needs a method to record credit hours above degree. This data is used for salary increases, para-pro education credits, etc.

2.6.1.5 Highly Qualified

2.6.1.5.1 Exam dates for Highly Qualified are stored in B05. Highly qualified certificates were issued to teachers in the past and filed (using the HOSSE method). The HOSSE method is no longer approved by DOE. The district will use the CrossPointe.net system.

2.6.1.6 Performance Evaluations

2.6.1.6.1 The district would like to explore the idea of housing performance evaluations on the system.

2.6.1.7 Reports

2.6.1.7.1 Board Report - The district presently prepare this report with a MS access database.

2.6.2 Future Consideration

None

2.6.3 Sarasota Specific Customization

None

2.7 Employee Portal

2.7.1 Baseline Features

2.7.1.1 W4 / Direct Deposit

2.7.1.1.1 The district would like the employees to have the ability to change the W4 information on the Portal. This will be a real time change. Email will be used to notify the payroll office of the change to the system. Additionally, a verification email will be sent to the originators email address as a security/verification method for the change.

2.7.1.1.2 If the employees have a lock on their W4 information, they will not be able to make changes to their W4 record.

2.7.1.1.3 The district would like the employees to have the ability to change/add direct deposit information on the Portal, workflow will be utilized to notify the payroll department of the change, and however, no authorization is required from the payroll staff. The employee account number will need to be entered twice.

2.7.1.2 Deductions and Benefits

2.7.1.2.1 The district would like to explore the ability to conduct open enrollment changes online via the employee portal. There would be no real time changes, they would all be placed in a queue for processing on a date certain. When changes are made, an additional "Are you sure" pop-up window displays to verify that the changes are verified prior to sending. Reports will be available for review by the benefits department.

2.7.1.2.2 In addition to changing benefits, they would like to see the affect of changing dependent benefits and the change in the cost for the employee.

2.7.1.3 Timesheets / Substitutes

2.7.1.3.1 It is recommended that the district utilize the SubFinder system to gather substitute information to load to CrossPointe.net. Information that is not gathered via the SubFinder system will be entered into the Timesheet section of the CrossPointe.net system by the employee or the proxy (i.e. classified subs). The workflow engine is built into the system for sub approval. The workflow was discussed as follows: Payroll Manager (site) to Administrator (site) and then to Payroll. Also allow SubFinder for Classified personnel

2.7.1.3.2 On the Timesheet portion of the Crosspointe.net system, they would like "Location" to be reamed as "Cost Center".

2.7.1.4 Miscellaneous

2.7.1.4.1 The district would like to see additional information displayed on the Employee Portal, as follows:

- Add test scores to portal
- Add Accounts Payable payments to employees - i.e. travel reimbursements, uniform reimbursements.
- ESOL endorsement information

2.7.2 Future Consideration

None

2.7.3 Sarasota Specific Customization

None

2.8 Payroll

2.8.1 Baseline Features

2.8.1.1 Employee

2.8.1.1.1 W4 Lock-in

2.8.1.1.2 Longevity for Overtime

2.8.2 Future Consideration

None

2.8.3 Sarasota Specific Customization

None

2.9 Budgeting

Integrate what they now do with Lotus Approach in CrossPointe.net the database with effective date processing will go a long way to eliminate the need of manual activity and also have data that now has a limited audience to be used by all employees who have a need to make decisions on budgets.

2.9.1 Baseline Features

None

2.9.2 Future Consideration

None

2.9.3 Sarasota Specific Customization

None

2.10 Substitute Monitoring

2.10.1 Baseline Features

2.10.1.1 Substitute Tracking

2.10.1.1.1 Provide screen(s) to qualify substitute. Including but not limited to: transcript show 2.5 GPA, where they certified and have the taught in the last 5 years (if no they have to do endorsement training,

2.10.1.1.2 Interface with Subfinder.

2.10.2 Future Consideration

None

2.10.3 Sarasota Specific Customization

None

2.11 State Reporting

2.11.1 Baseline Features

2.11.1.1 Survey

2.11.1.1.1 Provide method to report survey data for their Charter (approx 10) and alternative (approx 4) schools.

2.11.1.1.2 Add multi institution selection in the FLDOE batch submission process.

2.11.2 Future Consideration

None

2.11.3 Sarasota Specific Customization

None

3. Assumptions and Dependencies

- a. A comprehensive review of each and every report currently used by Sarasota was not conducted. Reports identified by Sarasota as custom are documented in the appropriate sections in this document.
- b. Interfaces for definition:
 - a. Winocular
 - b. SubFinder
 - c. Vacancy System
 - d. Approach Databases