

Client Intake - CCWA



| Format | Section/ Item | Response Detail 1 | Response Detail 2 | Response Detail 3 | holder |
|--------|--|---|---|--|--|
| 1 | 1 <input type="checkbox"/> Current HR Technology Stack Cost and Contract Expiration/ Notice Period Details | Name (software name) for Legacy System | Annual Cost for Legacy System | Contract End Date or Required Notice Period | |
| 2 | 3 Finance/Accounting System (for payroll journal entry interface) | JD Edwards | n/a | n/a | |
| 3 | 3 Do you use SSO (single sign-on)? If yes, what software? (e.g., Okta, | Azure AD (now Entra) | n/a | n/a | |
| 4 | 3 Benefits System and/or Administrator | Employee Navigator / JD Edwards | no cost | no cost | |
| 5 | 3 Compensation Planning | None (3 year surveys external consultant) | n/a | n/a | |
| 6 | 3 Core HR - Human Capital Management | JD Edwards | | 92000 | |
| 7 | 3 Learning | BizLibrary | | 31556 | 6/4/2025, written notice at least 90 days prior to the anniversary date of the effective date. |
| 8 | 3 Onboarding/ Offboarding | Revver | | 18000 | n/a |
| 9 | 3 Payroll | JD Edwards | | 47000 | n/a |
| 10 | 3 Recruiting/ ATS | Talent Pool Builder | | 10752 | Month to month, requires 3 month cancellation notice. |
| 11 | 3 Employment verification and/or drug screening services? | internal/ Peachtree Occupational Med | n/a | n/a | |
| 12 | 3 Reporting & Analytics | Insight - JDE | | 55000 | n/a |
| 13 | 3 Succession Planning | internal training team | no cost | n/a | |
| 14 | 3 Talent/ Performance Management | Trakstar | | 17900 | 12/10/2024 |
| 15 | 3 Time Management (Absence, LOA, Time, Scheduling, etc.) | JD Edwards | | 10000 | annually |
| 16 | 1 <input type="checkbox"/> Functionality/SKUs in Scope | Yes, Future Option, No (never) | No Additional Details Needed | No Additional Details Needed | |
| 17 | 3 Benefits | Yes | N/A | N/A | |
| 18 | 3 Compensation Planning (Merit, COLA, Bonus, Step Increases, etc.) | Yes | N/A | N/A | |
| 19 | 3 Core HR - Human Capital Management (Employee Record Mgmt) | Yes | N/A | N/A | |
| 20 | 3 HR Service Management | no | N/A | N/A | |
| 21 | 3 Learning | Yes | N/A | N/A | |
| 22 | 3 Onboarding/ Offboarding | Yes | N/A | N/A | |
| 23 | 3 Payroll | Yes | N/A | N/A | |
| 24 | 3 Reporting & Analytics | Yes | N/A | N/A | |
| 25 | 3 Recruiting/ ATS | Yes | N/A | N/A | |
| 26 | 3 Self-service Portal (Employee and Manager) | Yes | N/A | N/A | |
| 27 | 3 Talent/ Performance Management (Succession, Discipline, Reviews, etc) | Yes | N/A | N/A | |
| 28 | 3 Time Management (Absence, LOA, Time, Scheduling, etc.) | Yes | N/A | N/A | |
| 29 | 1 <input type="checkbox"/> Functionality/SKUs in Scope | Respond Accordingly | No Additional Details Needed | No Additional Details Needed | |
| 30 | 3 What business strategies are driving this HR transformation? | efficiency and automation; cloud bases employee self service capabilities | seamless processes and integration of systems | n/a | |
| 31 | 3 Beyond software, what are you looking for from a strategic HR system partner? | efficiency and automation | N/A | N/A | |
| 32 | 3 What are your Key growth objectives over the next 2-3 years? | n/a | N/A | N/A | |
| 33 | 3 How does the company plan to achieve these Key growth objectives? | n/a | N/A | N/A | |
| 34 | 3 How much time is HR spending per month on HR administrative work? | 120+ hours a month | N/A | N/A | |
| 35 | 1 <input type="checkbox"/> Details needed for SI partners to price their work: | Respond Accordingly | No Additional Details Needed | No Additional Details Needed | |
| 36 | 2 <input type="checkbox"/> Recruiting | Respond Accordingly | N/A | N/A | |
| 37 | 3 Number of career sites (e.g. LinkedIn & Indeed, and 1 PML External Career Site) | 1 | N/A | N/A | |
| 38 | 3 Are Candidate questionnaires/evaluations required | Yes | N/A | N/A | |
| 39 | 3 Number of offer letter templates (e.g., how many offer letter templates to cover all job types/levels/countries) | 1 | N/A | N/A | |
| 40 | 3 Do you have seasonal employees or as needed employees? If so, what process do you use to hire/account for them? | Yes | N/A | N/A | |
| 41 | 2 <input type="checkbox"/> Onboarding | Respond Accordingly | N/A | N/A | |
| 42 | 3 Number of new hire processes (e.g., one for hourly and one for salary) (e.g. one global process that covers all job types, different processes by region or country, or role/job type) | One global process | N/A | N/A | |
| 43 | 3 Number of job change processes (e.g., internal hire, inpat/expat, promotion, etc.) | 6 | N/A | N/A | |
| 44 | 2 <input type="checkbox"/> HR Core | Respond Accordingly | | N/A | |

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| 45 | 3 | Number of current 'REGISTERED' Legal Entities | 2 | N/A | |
| 46 | 3 | Number of in-process or future Legal Entities | 1 | N/A | |
| 47 | 3 | Total headcount (inclusive of part-time, full time, hourly, salary, and global if applicable) | 459 Active Positions 419 - Current Employee Count | N/A | |
| 48 | 3 | Total FUTURE FORECASTED headcount NEW HIRES in next 3 yrs (inclusive of part-time, full time, hourly, salary, and global if applicable) | 40 | N/A | |
| 49 | 3 | Total number of hourly employees | 303 | N/A | |
| 50 | 3 | Total number of salary employees | 116 | N/A | |
| 51 | 3 | Total # of Expats/Inpats (only applicable for global companies) | n/a | N/A | |
| 52 | 3 | Number of Unions/CBAs | n/a | N/A | |
| 53 | 3 | Number of non-paid employees (e.g., contractors, board members, interns, etc.) | none | N/A | |
| 54 | 3 | Do you currently use Position Management? If not, is there an interest to in the future? | Yes | N/A | |
| 55 | 3 | Do you have any matrix organization structures? (Indirect reporting relationships) | no | N/A | |
| 56 | 3 | What is your employee turnover %? | 10% | N/A | |
| 57 | 2 | Time & Absence | Respond Accordingly | N/A | |
| 58 | 3 | Number of leave plans (e.g., STD, FMLA, Sabbatical, Personal, Parental) | 11 | N/A | |
| 59 | 3 | Number of ACCRUAL absence plans | 2 | N/A | |
| 60 | 3 | Number of NON-ACCRUING absence plans | 9 | N/A | |
| 61 | 3 | Do you have accruals that vary based on the day or month the employee is hired? | No | N/A | |
| 62 | 3 | Number of holiday calendars * enter number of calendars (e.g., one global, per region, per country, per plant) | One | N/A | |
| 63 | 3 | Do you use physical timeclocks? If yes, how many? If yes, do you own them or rent them? | yes; own | N/A | |
| 64 | 3 | Number of unique work schedules | | N/A | |
| 65 | 3 | Number of time groups | | N/A | |
| 66 | 3 | Number of time entry codes | 41 | N/A | |
| 67 | 3 | Number of time entry validations | | N/A | |
| 68 | 3 | Are split cost center allocations used? | No | N/A | |
| 69 | 3 | Do you have shift differentials? | Yes | N/A | |
| 70 | 3 | Where do the exempt employees record vacation/sick time? | JD Edwards | N/A | |
| 71 | 3 | Is FMLA tracked in HR or time? | Both | N/A | |
| 72 | 3 | What system is vacation currently tracked in? | JD Edwards / Sharepoint | N/A | |
| 73 | 3 | Briefly Describe How You Track Vacation Time | manually | N/A | |
| 74 | 3 | Do you have sick time? If you have sick time how do you track it? | JD Edwards / Sharepoint | N/A | |
| 75 | 3 | Briefly describe any rules you operate on carryover accrual balances from prior years, including if there are different rules for different employee groups. | manually | N/A | |
| 76 | 3 | How do you manage leaves today? How many leave types do you have (maternity, paternity, etc)? | JD Edwards / Sharepoint | N/A | |
| 77 | 3 | Who has to enter time worked? (e.g., all hourly, all salaried, different by job code/dept/location, etc.)? | Both | N/A | |
| 78 | 3 | Do employees have to record time against projects in your time keeping system or in a separate projects system? If employees have to record time against projects who would have to record time against projects (hourly, salary, depends on role)? | Yes | N/A | |
| 79 | 2 | Payroll | Respond Accordingly | N/A | |
| 80 | 3 | How many state tax jurisdictions? | 1 | N/A | |
| 81 | 3 | How many local tax jurisdictions? | 0 | N/A | |
| 82 | 3 | Number of Pay Cycles (and types) (E.g. bi-weekly, monthly, weekly) | 2 | N/A | |
| 83 | 3 | Number of Pay Groups | 3 | N/A | |
| 84 | 3 | Payroll frequency - Do you have weekly payrolls? If yes, include number of employees on this payroll cycle. | No | N/A | |
| 85 | 3 | Payroll frequency - Do you have bi-weekly payrolls? If yes, include number of employees on this payroll cycle. | Yes - 419 | N/A | |
| 86 | 3 | Payroll frequency - Do you have monthly payrolls? If yes, include number of employees on this payroll cycle. | Yes - 7 | N/A | |
| 87 | 3 | Payroll frequency - Do you have semi-monthly? If yes, include number of employees on this payroll cycle. | No | N/A | |

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| 88 | 3 | Number of off-cycle ad-hoc payrolls per month. | 3 to 5 | N/A | N/A |
| 89 | 3 | Number of FTU (full-time employees) that process payroll | 1 | N/A | N/A |
| 90 | 3 | How are you tracking FMLA (Family & Medical Leave Act) today? If using a company, please list the company? | Third-Party Vendor | N/A | N/A |
| 91 | 3 | How are you doing ACA (Affordable Care Act) today? If using a company, please list the company and confirm if it fully managed finish to start? | Third-Party Vendor | N/A | N/A |
| 92 | 3 | What are your average number of garnishment deductions per month? | | N/A | N/A |
| 93 | 3 | What % of your employees are on direct deposit? | 98.8 | N/A | N/A |
| 94 | 2 | [-] Benefits | Respond Accordingly | N/A | N/A |
| | | Number of benefit plans | Medical - 4 Dental - 1 Vision - 1 HSA - 2 Flex - 3 (Employee Health, Dep Care, & Limited Purpose) Disability - 2 (Short-term & Long-term) Group Life - 1 (Employee Life & Dependent Life) Voluntary Life - 1 Long-Term Care Universal Life - 1 Group Accident - 1 Group Critical Illness - 1 457b Deferred Comp - 1 Roth - 1 Pet Insurance - 1 Pension - 1 | N/A | N/A |
| 95 | 3 | | | | |
| 96 | 3 | Number of benefit groups | 4 | N/A | N/A |
| 97 | 3 | Number of contracted benefit carriers/providers | 9 | N/A | N/A |
| 98 | 3 | List all contracted benefit carriers/providers | Anthem, Kaiser, MetLife, Wex, Greater Georgia Life, Nationwide Retirement Solutions, Nationwide, Clayton County BoC, Trustmark | N/A | N/A |
| 99 | 3 | Who do you use for COBRA Administration? | Wex | N/A | N/A |
| 100 | 3 | Do you Have Grand-fathered or Frozen benefit Rates for Groups of Employees? | No | N/A | N/A |
| 101 | 3 | Do any terminated employees still receive paid benefits? | Yes | N/A | N/A |
| 102 | 2 | [-] Advanced Compensation | Respond Accordingly | N/A | N/A |
| 103 | 3 | Single comp review process, or different by each plan. If different, please add details | Single | N/A | N/A |
| 104 | 3 | Number of bonus plans | 0 | N/A | N/A |
| 105 | 3 | Number of merit plans | 1 | N/A | N/A |
| 106 | 3 | Number of stock plans | 0 | N/A | N/A |
| 107 | 2 | [-] Learning | Respond Accordingly | N/A | N/A |
| 108 | 3 | Number of topics | 80 + | N/A | N/A |
| 109 | 3 | Number of instructors | 19 | N/A | N/A |
| 110 | 3 | Number of audiences | 419 | N/A | N/A |
| 111 | 3 | How many course/topic specific security groups | 0 | N/A | N/A |
| 112 | 1 | [-] Data Conversion Scope (History to convert: e.g., Top of Stack, 1 year, 3 year, 7yr) | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 113 | 2 | [-] HR Core | | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 114 | 3 | Employee status history | | | N/A |
| 115 | 3 | Job history | | | N/A |
| 116 | 2 | [-] Payroll | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 117 | 3 | Pay changes/history | | | N/A |
| 118 | 3 | W2s, annual pay forms | | | N/A |
| 119 | 3 | Paystubs | | | N/A |
| 120 | 2 | [-] Recruiting | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 121 | 3 | Applicant data | | | N/A |
| 122 | 3 | Open requisitions | | | N/A |
| 123 | 3 | Resumes | | | N/A |
| 124 | 2 | [-] Performance | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 125 | 3 | Review history - ratings (just scores) or detailed review history | | | N/A |

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| 126 | 2 | [-] Learning | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 127 | 3 | Employee learner history/certifications | | | N/A |
| 128 | 2 | [-] 3rd Party Documents | Legacy System Name | How much to convert (current, 1yr, 3yr, 7yr) | N/A |
| 129 | 3 | Bringing over 3rd party documents (EE forms, candidate resumes, profile pics via conversion, etc.) | N/A | no | N/A |
| 130 | 1 | [-] Annual Company Initiatives for Go-Live Date Consideration | Start Date (date range is fine) | End Date (date range is fine) | N/A |
| 131 | 2 | [-] Benefits | Start Date (date range is fine) | End Date (date range is fine) | N/A |
| 132 | 3 | Open Enrollment period: | Late March | Early April | N/A |
| 133 | 3 | Benefits Effective Date: | May 1st | April 30th | N/A |
| 134 | 2 | [-] Performance & Compensation | Start Date (date range is fine) | End Date (date range is fine) | N/A |
| 135 | 3 | Performance review annual cycle: | Based on Hire Date | | N/A |
| 136 | 3 | Compensation changes effective dates: | May 1st | | N/A |
| 137 | 3 | Promotions effective date: | Pay Period Begin Date | | N/A |
| 138 | 2 | [-] Timeline and Implementation Target Details | Implementation Start Date | Implementation Go Live Date | N/A |
| 139 | 3 | 'Target' Implementation Dates | | | N/A |
| 140 | 3 | Planned 'BIG BANG' (all modules live at one time) or 'PHASED' implementation and go lives | | | N/A |
| 141 | 1 | [-] OPTIONAL SERVICE DETAILS | Respond Accordingly | No Additional Details Needed | No Additional Details Needed |
| 142 | 3 | Change Management Services for implementation, stabilization, and/or adoption (or handling in-house). If yes, include end user training or only want templates for guidance | | | |
| 143 | 3 | List client Staff Augmentation for HCM implementation (e.g., Project Manager, HR/Recruit/Payroll Lead, Data Conversion Analyst, Testing Lead) | | | |
| 144 | 3 | Outsourced Payroll Managed Services post go live | | | |
| 145 | 3 | Outsourced Application System Support Services post go live (e.g., system admin support; release help, report creation, integration changes, configuration changes, etc.) | | | |