

Needs Assessment Questionnaire

Company Information

Company Name		Primary HR Contact & Title	
Address		Phone	
City/State/Zip		E-mail	
# Locations		Website	
Tech Contact		Finance Contact	
# of Active Employees		# of HR Staff and Managers	
# Locations			
% of employees Salaried vs. Hourly	Salaried: Hourly:	Turnover & Growth Rates	Turnover: Growth:

Evaluation Process

<p>Please indicate key decision-making milestone dates:</p> <ul style="list-style-type: none"> Research vendors - Selection of top vendors - Review top vendor presentations - Negotiations - Final purchase decision - Implementation - 	
Do you have consultants advising on this project? (If so, please provide contact information.)	
Do you plan to issue an RFP for the project?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What has been budgeted for the project?	
How are you currently managing human resources, employee, and benefits data? (If HRMS, what do you like about your current system? What would you like to see changed?)	<input type="checkbox"/> Paper <input type="checkbox"/> Excel/Access <input type="checkbox"/> HRMS _____
What other systems are you currently looking at? What features do you like about the other systems you have looked at?	
Top Three HRIS Objectives	#1 #2 #3

Technical Infrastructure

What kind of solution do you prefer?	<input type="checkbox"/> Client/Server <input type="checkbox"/> Web-based <input type="checkbox"/> ASP(hosted)
Do you support Microsoft SQL Server?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, are there future plans to upgrade?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does your staff have experience with SQL queries?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you utilize Microsoft Internet Information Services (IIS)? Which version?	<input type="checkbox"/> Yes <input type="checkbox"/> No
What operating system do you currently run on your server?	<input type="checkbox"/> Windows NT <input type="checkbox"/> 2000 <input type="checkbox"/> XP Other: _____

Integration Needs

Payroll	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
General Ledger	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
Time Clock or Time & Expense	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
Recruiting	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
Training	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
Performance Management	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Software and/or Vendor:</i>
Benefit Carriers	<input type="checkbox"/> Yes <input type="checkbox"/> No <i>Insurance Carrier/s and Type of Plan:</i>

Benefits Management

<p>Check off the types of benefit plans you offer your employees</p>	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Pension Plan <input type="checkbox"/> 401K/403B <input type="checkbox"/> FSA (Medical) <input type="checkbox"/> FSA (Dependent Care) <input type="checkbox"/> Basic Life <input type="checkbox"/> Supplemental Life <input type="checkbox"/> AD&D <input type="checkbox"/> LTD <input type="checkbox"/> STD <input type="checkbox"/> Other _____
<p>Do you use a TPA for benefits? (If Yes, what services do they provide?)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>Describe the eligibility policies associated with your benefits programs. How do you manage eligibility data, including dependents?</p>	
<p>How do you manage benefit and employee change requests (i.e. life events, new premiums, life events, benefits)?</p>	
<p>Describe your current process & communications for administering open enrollment and new hire enrollment.</p>	
<p>Are you currently reconciling your monthly bills from plan providers?</p>	<input type="checkbox"/> No <input type="checkbox"/> Manually <input type="checkbox"/> Automated _____
<p>Estimated frequency of inbound calls into HR related to benefits.</p>	

Time-Off Management

<p>Check off the time-off benefits you offer your employees.</p>	<input type="checkbox"/> Sick <input type="checkbox"/> Vacation <input type="checkbox"/> Personal <input type="checkbox"/> FMLA <input type="checkbox"/> Other _____
<p>Estimated frequency of inbound calls to HR related to an employee's time off</p>	
<p>Describe your leave request process.</p>	
<p>Describe the eligibility policies associated with your leave programs. How do you manage eligibility data?</p>	

Compliance

In a given year, how many OSHA cases do you file?	
How do you track FMLA details? What is your process of being reminded of when employees return from FMLA?	
Do you outsource COBRA? (If No, please describe how you manage COBRA.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you are qualified to report on EEO and VETS-100 data, what is the estimated time to compile this data into the required reporting standard?	
Are there other local, state or federal compliance issues that are a challenge for your organization to manage?	

General HR

How do you manage historical and current employee data?	
How many different places/systems does HR data reside in? How do you update changes in each of the systems?	
How do you address salary planning and compensation management?	
Describe the process of creating and distributing batch e-mails and/or letters?	
How do you document the communication between HR / managers and employees?	
What other HR-related data would you like to track (i.e. assets, credit cards, training, skills, etc.)?	
How are you alerted of critical HR events (i.e. overage dependent, 1-9 not completed, birthdays, performance reviews, etc.)?	
Describe your current data management process of bringing on board a new hire? Terminating an employee?	

Reporting Requirements

Benefits	#1 #2 #3
Time-Off	#1 #2 #3
Compliance	#1 #2 #3
General HR	#1 #2 #3
Other Reporting Needs (including custom reports)	

Please describe any other requests or requirements that your HR solution should address.
