FIRST AMENDMENT TO AGREEMENT FOR SERVICES OF INDEPENDENT CONTRACTOR TO

TO IMPLEMENT AN ORACLE CLOUD SERVICES HUMAN CAPITAL MANAGEMENT SYSTEM

Santa Barbara County
Department of Social Services

***First* Amendment**

This is a *First* Amendment (*First* Amendment to the Agreement) to the Agreement for Services of Independent Contractor, by and between the **County of Santa Barbara** (COUNTY) and **eVerge Group, LLC** (CONTRACTOR).

WHEREAS, on August 22, 2017, COUNTY approved the Agreement for Services of Independent Contractor, number BC#18-109, (Agreement) for the implementation consultation and configurations for the implementation of an Oracle Cloud Services Human Capital Management System (HCM);

WHEREAS, the initial term of the Agreement commenced on August 22, 2017, and was set to expire on June 30, 2019;

WHEREAS, the parties now desire to amend the Agreement to *increase the compensation, extend the expiration date* and *modify the scope* of work of the existing Agreement*; and*

NOW, **THEREFORE**, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, COUNTY and CONTRACTOR agree as follows.

The Agreement is amended as follows:

1. Section 1, **DESIGNATED REPRESENTATIVE**, of the Agreement, is amended to state in its entirety:

Laura Mejia at phone number (805) 346-7312 is the representative of COUNTY and will administer this Agreement for and on behalf of COUNTY. *Kirsty Johnson at phone number (972) 398-5938* is the authorized representative for CONTRACTOR. Changes in designated representatives shall be made only after advance written notice to the other party.

2. Section 2, **NOTICES**, of the Agreement, is amended to state in its entirety:

Any notice or consent required or permitted to be given under this Agreement shall be given to the respective parties in writing, by personal delivery or facsimile, or with postage prepaid by first class mail, registered or certified mail, or express courier service, as follows:

To COUNTY:	Laura Mejia, Administrative Operations Manager, 2125 S. Centerpointe Parkway, Santa Maria, CA 93455, (805) 346-7312
To CONTRACTOR:	*Kirsty Johnson, Controller*, 4965 Preston Park Blvd, Suite 700, Plano, TX 75093, *(972)398-5938*

or at such other address or to such other person that the parties may from time to time designate in accordance with this Notices section. If sent by first class mail, notices and consents under this section shall be deemed to be received five (5) days following their deposit in the U.S. mail. This Notices section shall not be construed as meaning that either party agrees to service of process except as required by applicable law.

3. Section 4, **TERM**, of the Agreement, is amended to state in its entirety:

CONTRACTOR shall commence performance on August 22, 2017, and end performance upon completion, but no later than *October 1, 2019*, unless otherwise directed by COUNTY or unless earlier terminated.

4. Add Section 39, **PROCUREMENT OF RECOVERED MATERIALS,** to the Agreement as follows:

CONTRACTOR must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

5. Add Section 40, **DRUG FREE WORKPLACE**, to the Agreement as follows:

Drug-free workplace. CONTRACTOR must comply with drug-free workplace requirements in Subpart B (or Subpart C, if the recipient is an individual) of 2 CFR part 382, which adopts the Governmentwide implementation (2 CFR part 182) of sec. 5152-5158 of the Drug-Free Workplace Act of 1988 (Pub. L. 100-690, Title V, Subtitle D; 41 U.S.C. 701-707).

6. **EXHIBIT A, Statement of Work (SOW),** is replaced in its entirety with **EXHIBIT A**, **Amended Statement of Work,** attached and incorporated by reference.

7. Section A of **EXHIBIT B** is amended to state in its entirety:

For CONTRACTOR services to be rendered under this Agreement, CONTRACTOR shall be paid a total contract amount, including cost reimbursements, not to exceed ***$517,471.94,*** **which includes a contingency of $38,478.26.**

Table I - Project Pricing	
Step 1 Pricing	$106,504.51
Step 2 Pricing	$372,489.17
Project Total	$478,993.68
Contingency	$38,478.26

8. Section C of **EXHIBIT B** is amended to state in its entirety:

Upon completion of the work for each milestone and/or delivery to COUNTY of item(s) specified below, CONTRACTOR shall submit to the COUNTY DESIGNATED REPRESENTATIVE an invoice or certified claim on the County Treasury for the service performed in accomplishing each milestone. These invoices or certified claims must cite the assigned Board Contract Number. COUNTY DESIGNATED REPRESENTATIVE shall evaluate the quality of the service performed and/or item(s) delivered and if found to be satisfactory shall initiate payment processing. COUNTY shall pay invoices or claims for satisfactory work within 30 days of receipt of correct and complete invoices or claims from CONTRACTOR.

Deliverable Description and Milestone	Maximum Amount Chargeable
Step 1 - Task 1, to include 1.1 – 1.4. Assign a Project Manager. *Inception Completed*	Milestone 1: $15,502.90
Step 1 - Task 12. Design and document an admission control and capture process to control access to *HCM*. *Inception Completed*	

Step 1 - Task 15. Develop and document with the COUNTY a mutually agreeable *HCM* configuration change management process. *Inception Completed*	
Step 1 - Task 16, to include 16.1 – 16.9. Develop a detailed implementation plan and schedule. *Inception Completed*	
Step 1 - Task 3, to include 3.1 – ~~3.11~~ 3.12. Review existing workflows for the required and optional sections of the *Personnel Employee Reporting Systems (PERS) Database* Request for Proposal (*RFP*). Configure *the HCM* to establish *the Human Resource Management System (HRMS)* functionality. *Elaboration 50% Complete*	Milestone 2: $ 38,935.80
Step 1 - Task 4. Demonstrate functional elements of *HCM*. *Elaboration 50% Complete*	
Step 1 - Task 6. Review and document ways to move the data *in the Department of Social Services' (DSS) PERS* to Data Visualization Cloud or with *the HCM*. *Elaboration 50% Complete*	
Step 1 - Task 8. Review and document data migration fields. *Elaboration 50% Complete*	
Step 1 - Task 9. Review and document data synchronization fields. *Elaboration 50% Complete*	
Step 1 - Task 5. Update workflows in collaboration with *DSS*. *Elaboration 100% Complete*	Milestone 3: $31,005.80
Step 1 - Task 10. Review and document interfaces between new and old systems. *Elaboration 100% Complete*	
Step 1 - Task 11. Design, *customize* and document security and privacy elements. *Elaboration 100% Complete*	
Step 1 - Task 13. Prepare and document an Acceptance Test criteria *and User Acceptance Test document*. *Elaboration 100% Complete*	
Step 1 - Task 14, to include 14.1 – 14.2. Develop a training plan. *Elaboration 100% Complete*	
Step 2 - Task 1.1. Assign the same Project Manager in Step 1 for Step 2. *Construction 50% Complete*	Milestone 4: *$119,477.02*
Step 2 - Task 1.2. DSS and CONTRACTOR shall meet weekly either onsite as required by DSS and/or by web collaboration to discuss implementation progress. Meeting notes shall be prepared by CONTRACTOR for each of the weekly review meetings. *Construction 50% Complete*	
Step 2 - Task 1.3. Review overall design and engineering. *Construction 50% Complete*	
Step 2 - Task 1.4. Configure, program, and test *software to ensure that software meets requirements as defined in Step 1*. *Construction 50% Complete*	
Step 1-Task *3.12*. Reconfigure *HCM* to optimize Oracle *enhancements and updates* that were *released in the fall of 2018*, release 18B and 18C.	

Task	Milestone
Step 2 - Task 1.5. Configure, program, and test application modules. *Construction 50% Complete*	
Step 1 - Task 7. Validate number and types of software licenses to be purchased for the implementation of the *HCM*.	Milestone 5: $*99,122.62*
Step 2 - Task 1.6. Convert, *clean up data conversion files prior to loading of data into the HCM* and test existing data. *Construction 100% complete*	
Step 2 - Task 1.7. Test entering new data. *Construction 100% complete*	
Step 2 - Task 1.8. *Assist in the design of interfaces,* test interfaces and data transfer, *including future automated configuration implemented prior to the end of this contract.* *Transition Materially Complete*	
Step 2 - Task 1.9. Conduct overall *HCM* tests and work with COUNTY to perform User Acceptance Tests developed in the Step 1. *Transition Materially Complete*	
Step 2 - Task 1.10. Re-evaluate workflows in collaboration with DSS. *Transition Materially Complete*	
Step 2 - Task 1.11. Review, *configure specialized security roles* and confirm security and privacy issues during implementation and testing. *Transition Materially Complete*	Milestone 6: $*98,132.52*
Step 2 - Task 1.12. Perform any data cleanup required. *Transition Materially Complete*	
Step 2 - Task 1.13. Provide documentation *and training* of *HCM* configuration *including hands-on training on how to modify customized fields.* *Transition Materially Complete*	
Step 2 - Task 1.14 *to include 1.14.1- 1.14.2.* Conduct training to users via web based and managers & key staff via onsite *Transition Materially Complete*	
Step 2 - Task 1.15. Provide Post-Go Live date support documentation. *Stabilization Materially Complete*	
Step 2 - Task 1.16. Prepare and document process to extract data, in case the COUNTY moves away from the CONTRACTOR *Stabilization Materially Complete*	Milestone 7: $76,817.02
Step 2 - Task 1.17. Prepare and present a support services contract to provide two software revisions upgrades per year for the duration of the Oracle/Mythics contract. *Stabilization Materially Complete*	

50% of the final milestone payment (Milestone 7) above shall not be made until all services have been completed and item(s) as specified in **EXHIBIT A** have been delivered and found to be satisfactory by COUNTY.

In all other respects, the Agreement remains unchanged and shall remain in full effect.

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First Amendment to the Agreement between the **County of Santa Barbara** and **eVerge Group, LLC.**

IN WITNESS WHEREOF, the parties have executed this First Amendment to the Agreement to be effective on the date executed by COUNTY.

ATTEST: **COUNTY OF SANTA BARBARA:**

Mona Miyasato
County Executive Officer
Clerk of the Board

By: _____   By: _____
    Deputy Clerk   Steve Lavagnino, Chair
                                                                 Board Of Supervisors

                                              Date: _____

RECOMMENDED FOR APPROVAL: **CONTRACTOR:**

Department of Social Services   eVerge Group, LLC

By: _____   By: _____
    Daniel Nielson   Authorized Representative

                                              Name: _____Kirsty Johnson_____

                                              Title: _____Controller_____

APPROVED AS TO FORM: **APPROVED AS TO ACCOUNTING FORM:**

Michael C. Ghizzoni   Betsy M. Schaffer, CPA
County Counsel   Auditor-Controller

By: _____   By: _____
    Deputy County Counsel   Deputy

APPROVED AS TO FORM:

Risk Management

By: _____
    Risk Management

EXHIBIT A

AMENDED
STATEMENT OF WORK

This SOW is made by and between the COUNTY and CONTRACTOR to provide the services specified herein. Terms not defined herein shall be referred to the glossary in the PERS Database RFP.

In the event the Agreement is terminated, and without limiting the terms of the Agreement, CONTRACTOR shall deliver to DSS, in printed and on electronic media, where applicable, all data, drawings, reports, and other materials that have been collected, created or developed pursuant to the SOW.

CONTRACTOR shall perform all tasks, which will result in a properly configured and installed *HCM*.

STEP 1: Design and Document *HCM* Elements

CONTRACTOR shall deliver to COUNTY the required information in Step 1 in printed format and on softcopy media.

1   CONTRACTOR shall commence work within two weeks of receiving notice of the Board execution of the Agreement and shall assign a Project Manager.

   1.1   CONTRACTOR shall assign a Project Manager and provide a resume of the Project Manager to COUNTY.

   1.2   CONTRACTOR shall arrange for a phone interview with DSS and the CONTRACTOR Project Manager. DSS must approve the Project Manager prior to the commencement of work.

   1.3   DSS and CONTRACTOR shall meet weekly either onsite as required by DSS and/or by web collaboration to discuss progress and content of the *HCM* design. DSS shall provide CONTRACTOR with input regarding the *HCM* design. Meeting notes shall be prepared by CONTRACTOR for each of the weekly review meetings.

   1.4   At the start of Step 1, CONTRACTOR shall present the first draft of the timeline for the implementation of Step 1.

2   COUNTY shall order the following Oracle Software through Mythics.

Fusion Human Capital Management Base Cloud Service	B85800
Fusion Goal Management Cloud Service	B67291
Fusion Performance Management Cloud Service	B67293
Transparent Data Encryption for Oracle Fusion Security Cloud Service	B84494
Oracle Data Visualization Cloud Service	B84522
Additional Test Environment for Oracle Fusion Cloud Service	B84490

3   CONTRACTOR shall review existing workflows for the required and optional sections of the RFP as responded by CONTRACTOR against the capabilities of the *HCM*. CONTRACTOR shall configure the *HCM* to establish the HRMS functionalities identified below:

3.1   Position Management – CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Fusion Human Capital Management Base Cloud Service software as follows:

Item No	HRMS Functionality	Corresponding Oracle Software Module
1.	Position Definitions, Codes & Functions	Fusion Human Capital Management Base Cloud Service
2.	Position Classifications	Fusion Human Capital Management Base Cloud Service
3.	Budgeted	Fusion Human Capital Management Base Cloud Service
4.	Non-Budgeted	Fusion Human Capital Management Base Cloud Service
5.	Salary	Fusion Human Capital Management Base Cloud Service
6.	Filled	Fusion Human Capital Management Base Cloud Service
7.	Vacancies	Fusion Human Capital Management Base Cloud Service
8.	FTEs	Fusion Human Capital Management Base Cloud Service
9.	Other	Fusion Human Capital Management Base Cloud Service
10.	Loaned	Fusion Human Capital Management Base Cloud Service
11.	Trainees	Fusion Human Capital Management Base Cloud Service
12.	Department	Fusion Human Capital Management Base Cloud Service
13.	Division	Fusion Human Capital Management Base Cloud Service
14.	Unit	Fusion Human Capital Management Base Cloud Service
15.	Location	Fusion Human Capital Management Base Cloud Service
16.	Change Classifications	Fusion Human Capital Management Base Cloud Service
17.	Organizational Charts	Fusion Human Capital Management Base Cloud Service
18.	Reports, including real time and historical	Fusion Human Capital Management Base Cloud Service

Item No	HRMS Functionality	Corresponding Oracle Software Module
19.	Include fields for Program, Org, Project, Activity and Area to all Position Records	Fusion Human Capital Management Base Cloud Service

3.2   Employee Records and Demographics - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Fusion Human Capital Management Base Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Employee Information	Fusion Human Capital Management Base Cloud Service
2.	Name	Fusion Human Capital Management Base Cloud Service
3.	Home Address	Fusion Human Capital Management Base Cloud Service
4.	Work Address	Fusion Human Capital Management Base Cloud Service
5.	Multiple Telephone Numbers	Fusion Human Capital Management Base Cloud Service
6.	Work	Fusion Human Capital Management Base Cloud Service
7.	Cell	Fusion Human Capital Management Base Cloud Service
8.	Alternate	Fusion Human Capital Management Base Cloud Service
9.	Home	Fusion Human Capital Management Base Cloud Service
10.	Email	Fusion Human Capital Management Base Cloud Service
11.	Work	Fusion Human Capital Management Base Cloud Service
12.	Personal	Fusion Human Capital Management Base Cloud Service
13.	Emergency Contact Information	Fusion Human Capital Management Base Cloud Service
14.	Work Space #	Fusion Human Capital Management Base Cloud Service
15.	Unit	Fusion Human Capital Management Base Cloud Service
16.	Supervisor name	Fusion Human Capital Management Base Cloud Service
17.	Division	Fusion Human Capital Management Base Cloud Service
18.	Branch, e.g. Administration, Adult and Children Service	Fusion Human Capital Management Base Cloud Service

Item No	HRMS Functionality	Oracle Software Module
19.	Department	Fusion Human Capital Management Base Cloud Service
20.	Classification.	Fusion Human Capital Management Base Cloud Service
21.	Full Time Equivalents, Trainee etc.	Fusion Human Capital Management Base Cloud Service
22.	County (Santa Barbara County (SBC)) Employee ID	Fusion Human Capital Management Base Cloud Service
23.	SBC Position Number	Fusion Human Capital Management Base Cloud Service
24.	Worker ID for CalWIN #, etc.	Fusion Human Capital Management Base Cloud Service
25.	Program	Fusion Human Capital Management Base Cloud Service
26.	Work Location and address	Fusion Human Capital Management Base Cloud Service
27.	Home Address	Fusion Human Capital Management Base Cloud Service
28.	IPad	Fusion Human Capital Management Base Cloud Service
29.	Mi-Fi	Fusion Human Capital Management Base Cloud Service
30.	Laptop	Fusion Human Capital Management Base Cloud Service
31.	Cell Phones	Fusion Human Capital Management Base Cloud Service
32.	Employment Lifecycle History	Fusion Human Capital Management Base Cloud Service
33.	Nepotisms, Relation to any other employee in the County	Fusion Human Capital Management Base Cloud Service
34.	Educational Degrees	Fusion Human Capital Management Base Cloud Service
35.	Ethnicity	Fusion Human Capital Management Base Cloud Service
36.	Age/Date Of Birth	Fusion Human Capital Management Base Cloud Service
37.	Generations	Fusion Human Capital Management Base Cloud Service
38.	Gender	Fusion Human Capital Management Base Cloud Service
39.	Languages	Fusion Human Capital Management Base Cloud Service
40.	Years of Experience in Classification	Fusion Human Capital Management Base Cloud Service
41.	Non Learning Management Systems (LMS) Training Completed, i.e. Red Cross Training or Other Training	Fusion Human Capital Management Base Cloud Service

Item No	HRMS Functionality	Oracle Software Module
42.	Employee Self-Service (ESS) - Fields will be determined during the implementation. Explain if there are any limitations.	Fusion Human Capital Management Base Cloud Service
43.	Name Changes with alerts	Fusion Human Capital Management Base Cloud Service
44.	Manager/Supervisor Self-Service - Fields will be determined during the implementation. Explain if there are any limitations.	Fusion Human Capital Management Base Cloud Service
45.	Ability to run reports on the above including real time and historical	Fusion Human Capital Management Base Cloud Service
46.	*Add Checklist to New Hire process to communicate additional tracking information that is required*	*Fusion Human Capital Management Base Cloud Service*
47.	*Add Checklist to Move Position process to communicate additional tracking information that is required*	*Fusion Human Capital Management Base Cloud Service*
48.	*Add Checklist to Assignment Change Position process to communicate additional tracking information that is required*	*Fusion Human Capital Management Base Cloud Service*
49.	*Add Checklist to Loan Position process to communicate additional tracking information that is required*	*Fusion Human Capital Management Base Cloud Service*
50.	*Add Checklist to Multiple Move process to communicate additional tracking information that is required*	*Fusion Human Capital Management Base Cloud Service*
51.	*Change the field names from "Manager" to "Supervisor" everywhere in the Application*	*Fusion Human Capital Management Base Cloud Service*

3.3 Track Leave of Absence - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Fusion Human Capital Management Base Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Leave of absence begin	Fusion Human Capital Management Base Cloud Service
2.	Manager/supervisor notification	Fusion Human Capital Management Base Cloud Service
3.	Assignment reorientation/ease in	Fusion Human Capital Management Base Cloud Service
4.	Updated training requirements	Fusion Human Capital Management Base Cloud Service

Item No	HRMS Functionality	Oracle Software Module
5.	Update Employee Performance Review (EPR) timeline	Fusion Human Capital Management Base Cloud Service
6.	Payroll notification	Fusion Human Capital Management Base Cloud Service
7.	TrackIT notification	Fusion Human Capital Management Base Cloud Service
8.	Facilities notification	Fusion Human Capital Management Base Cloud Service
9.	Fiscal notification	Fusion Human Capital Management Base Cloud Service
10.	Leave of absence end	Fusion Human Capital Management Base Cloud Service
11.	Manager/supervisor notification	Fusion Human Capital Management Base Cloud Service
12.	Assignment reorientation/ease in	Fusion Human Capital Management Base Cloud Service
13.	Updated training requirements	Fusion Human Capital Management Base Cloud Service
14.	Update EPR timeline	Fusion Human Capital Management Base Cloud Service
15.	Payroll notification	Fusion Human Capital Management Base Cloud Service
16.	TrackIT notification	Fusion Human Capital Management Base Cloud Service
17.	Facilities notification	Fusion Human Capital Management Base Cloud Service
18.	Fiscal notification	Fusion Human Capital Management Base Cloud Service
19.	Reports	Fusion Human Capital Management Base Cloud Service

3.4   Track Employee Performance Reviews - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Fusion Human Capital Management Base Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Internal due date reminders by unit, division, branch and department	Fusion Performance Management Cloud service
2.	Evaluation Type	Fusion Performance Management Cloud service
3.	3 month	Fusion Performance Management Cloud service
4.	Mid-term	Fusion Performance Management Cloud service

First Amendment - eVerge, LLC Agreement for HCM

Item No	HRMS Functionality	Oracle Software Module
5.	Mid-term/Merit	Fusion Performance Management Cloud service
6.	9 Month	Fusion Performance Management Cloud service
7.	Final Probation	Fusion Performance Management Cloud service
8.	Annual	Fusion Performance Management Cloud service
9.	Annual Merit	Fusion Performance Management Cloud service
10.	Individual Development Plan check-in	Fusion Performance Management Cloud service
11.	Check-in	Fusion Performance Management Cloud service
12.	Performance Evaluation	Fusion Performance Management Cloud service
13.	Leadership Evaluation	Fusion Performance Management Cloud service
14.	Special	Fusion Performance Management Cloud service
15.	Performance Improvement Plan	Fusion Performance Management Cloud service
16.	County due date reminders by unit, division, branch and department	Fusion Performance Management Cloud service
17.	List of completed employee reviews	Fusion Performance Management Cloud service
18.	Track all late EPRs	Fusion Performance Management Cloud service
19.	Reports, ad-hoc, fixed and automated	Fusion Performance Management Cloud service
20.	*Configure customized signature blocks, as required by COUNTY, to Performance Evaluation templates*	*Fusion Performance Management Base Cloud Service*
21.	*Configure customized extension of performance pages*	*Fusion Performance Management Base Cloud Service*

3.5 Identify and Document External *HCM* Interfaces, Integration and Data Migration - CONTRACTOR shall complete the services identified under the HRMS functionality column through the methodology identified under the corresponding Oracle Software Module column as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Customization of fields may be required during the final design and implementation.	Delivered Flex Fields can be configured for specific County usage
2.	Existing data migration from PERS and e-Personality.	Data migrations into delivered HCM Cloud table structures are

Item No	HRMS Functionality	Oracle Software Module
		accomplished using delivered data import utilities
3.	This includes tables within the PERS SQL database.	Data migrations into delivered HCM Cloud table structures are accomplished using delivered data import utilities
4.	Developing process to sync records with e-Personality.	Delivered HCM Cloud technology is used to develop integrations into and out of the HCM Cloud solution
5.	The interface to *HCM* must be encrypted.	Delivered HCM Cloud technology is used to develop integrations into and out of the HCM Cloud solution
6.	TrackIT	Delivered HCM Cloud technology is used to develop integrations into and out of the HCM Cloud solution
7.	DSS LMS	Delivered HCM Cloud technology is used to develop integrations into and out of the HCM Cloud solution
8.	*Ensure that single sign on capability is included in the HCM*	*Delivered HCM Cloud technology* provides users with unified sign-on and authentication across enterprise applications

3.6   Hiring Process - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the software identified under the corresponding Oracle Software Module as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Offboarding	Fusion Human Capital Management Base Cloud Service
2.	Create check list for Offboarding	Fusion Human Capital Management Base Cloud Service
3.	Attrition by promotions	Fusion Human Capital Management Base Cloud Service
4.	Attrition by laterals	Fusion Human Capital Management Base Cloud Service
5.	Attrition by demotions	Fusion Human Capital Management Base Cloud Service
6.	Attrition by separations	Fusion Human Capital Management Base Cloud Service
7.	Exit interviews	Fusion Performance Management Cloud service
8.	Reasons	Fusion Human Capital Management Base Cloud Service
9.	Reports	Fusion Human Capital Management Base Cloud Service

3.7   Budgeting Forecast - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirement through the Oracle Data Visualization Cloud Service Software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Ability to query the Auditor Controller's budgeting system and extract budget for each budgeted DSS position.	Oracle Data Visualization Cloud Service

3.8   Cross-check Timesheet - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Oracle Data Visualization Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Timesheet verification by Fiscal department	Oracle Data Visualization Cloud Service
2.	Employee enters directly into ESS+, timesheet application	Oracle Data Visualization Cloud Service
3.	Before timesheet is finalized, Fiscal downloads the information from ESS+ to Excel	Oracle Data Visualization Cloud Service
4.	Verification of proper coding of timesheet	Oracle Data Visualization Cloud Service
5.	Every two weeks	Oracle Data Visualization Cloud Service

3.9   Cross-Check Random Moment Sampling (RMS) - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Oracle Data Visualization Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	RMS verification by Fiscal department	Oracle Data Visualization Cloud Service
2.	Employee enters directly into ESS+, timesheet application	Oracle Data Visualization Cloud Service
3.	Fiscal downloads RMS from RMS application	Oracle Data Visualization Cloud Service
4.	Verification of proper RMS coding	Oracle Data Visualization Cloud Service
5.	Every month	Oracle Data Visualization Cloud Service

3.10   Lost Time Report - CONTRACTOR shall configure the *HCM* to establish the HRMS functionality requirements through the Oracle Data Visualization Cloud Service software as follows:

Item No	HRMS Functionality	Oracle Software Module
1.	Download employee name, ID, available hours, lost times category hours from Departmental Employee Network into Excel	Oracle Data Visualization Cloud Service
2.	Employee Detail by department	Oracle Data Visualization Cloud Service
3.	Lost time above average employee exception	Oracle Data Visualization Cloud Service
4.	Download from PERS into Excel	Oracle Data Visualization Cloud Service
5.	Report on lost time & overtime tracking	Oracle Data Visualization Cloud Service

3.11 *Merge Data from DSS' Legacy Personal Tracking System with the HCM - CONTRACTOR shall configure the* HCM *to establish the HRMS functionality requirements through the Oracle Data Visualization Cloud Service software.*

Item No	HRMS Functionality	Oracle Software Module
1.	*Develop an on demand query that allows for the merging of employee data from PERS with HCM.*	*Oracle Data Visualization Cloud Service*

3.12 R*econfigure HCM to optimize Oracle enhancements and updates that were released in the fall of 2018, release 18B and 18C - CONTRACTOR shall configure the HCM to establish HRMS functionality requirements through the Fusion Core Human Resources, Performance Management Base Cloud Service and Oracle Data Visualization Cloud Services.*

4 Demonstrate functional elements of the *HCM*.

5 Update workflows in collaboration with DSS.

6 Review and document methods to move the data *in PERS, DSS' legacy system,* to Data Visualization Cloud or with the *HCM*.

7 Validate number and types of software licenses to be purchased for the implementation of the *HCM*.

8 Review and document data migration fields.

9 Review and document data synchronization fields.

10 Review and document interfaces between new and old systems.

11 Design*, customize* and document security and privacy elements.

12 Design and document an admission control and capture process to control access to the *HCM*.

13 Prepare and document an Acceptance Test criteria and User Acceptance Test document.

14 Prepare and document the training plan to include:

14.1 Administration training and manuals – Onsite; and

14.2 End-user training – Web based and web tutorials.

15 Develop and document with the COUNTY a mutually agreeable software configuration change management process.

16 Develop a detailed implementation plan and schedule.

As part of Step 1, CONTRACTOR shall develop a detailed plan and schedule for implementation of the *HCM* for Step 2. The detailed implementation plan shall include, but not be limited to, the following plan elements:

16.1 Test plan

16.2 Installation sequence

16.3 *HCM* configuration and programming

16.4 Interfaces and data transfer

16.5 Data integrity test

16.6 Training

16.7 Data clean up

16.8 Knowledge transfer

16.9 Post installation support.

17 CONTRACTOR shall complete the following Table - Completion Checklist:

Completion Checklist	
Deliverables	**Checklist Yes/No**
1. Assign a Project Manager.	
2. Review existing workflows for the required and optional sections of the RFP.	
3. Demonstrate functional elements of the **HCM**.	
4. Update workflows in collaboration with DSS.	

Completion Checklist	
Deliverables	**Checklist Yes/No**
5. Review and document ways to move the data *in DSS'* PERS to Data Visualization Cloud or with the HCM.	
6. Validate number and types of software licenses to be purchased for the implementation of the **HCM**.	
7. Review and document data migration fields.	
8. Review and document data synchronization fields.	
9. Review and document interfaces between new and old systems.	
10. Design and document security and privacy elements.	
11. Design and document an admission control and capture process to control access to the **HCM**.	
12. Prepare and document an Acceptance Test criteria.	
13. Develop a training plan.	
14. Develop and document with the COUNTY a mutually agreeable **HCM** configuration change management process.	
15. Develop a detailed implementation plan and schedule.	

Completion of the requirements set forth herein and COUNTY's acceptance concludes Step 1.

STEP 2: Software Procurement and Implementation.

1   Following are the tasks to be completed by CONTRACTOR by _**June 30, 2019**_ after completion and acceptance of Step 1:

1.1   Assign the same Project Manager in Step 1 for Step 2.

1.2   DSS and CONTRACTOR shall meet weekly either onsite as required by DSS and/or by web collaboration to discuss implementation progress. Meeting notes shall be prepared by CONTRACTOR for each of the weekly review meetings.

1.3   Review overall design and engineering.

1.4   Configure, program, and test Software _to ensure that software meets requirements as defined in Step 1_.

1.5   Configure, program, and test application modules.

1.6   Convert, _clean up data conversion files prior to loading of data into the HCM_ and test existing data.

1.7   Test entering new data.

1.8   _Assist in the design of interfaces,_ test interfaces and data transfer, _including future automated configuration implemented prior to the end of this contract_.

1.9   Conduct overall _HCM_ tests and work with COUNTY to perform User Acceptance Tests developed in the Step 1.

1.10   Re-evaluate workflows in collaboration with DSS.

1.11   Review_, configure specialized security roles_ and confirm security and privacy issues during implementation and testing.

1.12   Perform any data cleanup required.

1.13   Provide documentation _and training_ of _HCM_ configuration _including hands-on training on how to modify customized fields_.

1.14   Conduct training to:

1.14.1   Users via web based training module; and

1.14.2   Managers and key staff via onsite training.

1.14.3   _A minimum of 40 WebEx demonstration of elements of HCM to the county HCM project team._

1.14.4   _A minimum of 24 hours of onsite training on the Oracle Data Visualization Cloud Service product._

1.15   Provide Post-Go Live date support documentation.

       1.15.1   Go Live is defined as first day of *HCM* use by the DSS employees.

1.16   Prepare and document process to extract data, in case the COUNTY moves away from the CONTRACTOR.

1.17   Prepare and present a support services contract to provide two software revisions upgrades per year for the duration of the Oracle/Mythics contract.

2   Acceptance

2.1   COUNTY shall be present and witness to all such tests at the time of performance testing by CONTRACTOR. When tests have been completed to CONTRACTOR's satisfaction, CONTRACTOR shall give the COUNTY written notice that the tests have been successfully completed. CONTRACTOR shall provide copies of tests and any required certification that all applicable standards and specifications have been met.

2.2   CONTRACTOR must demonstrate that the *HCM* is working based on Step 1 Design, and is in accordance with Oracle's specifications. There will be an acceptance clock that runs for 30 days (Acceptance Clock) following the Go Live date based on CONTRACTOR's Acceptance Test Criteria established during Step 1. The *HCM* must operate without any "Major Service Outage" for 30 consecutive days (Acceptance Period). Major Service Outage is defined as the *HCM* is not performing as programmed. Upon the expiration of the 30 day Acceptance Period, the COUNTY will provide written approval that acceptance has been achieved.

2.3   During the Acceptance Period, the Acceptance Clock will be reset to zero upon CONTRACTOR's receipt of notification from the COUNTY of any Major Service Outage.

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