HCMatrix

1. **Training and Development:**
   Admin Profile:
   a. **Admin should be able to add or import a list of trainings**
      i. **Each training should be assigned to a job role**
      ii. **Each training must have a start date and End date**
      iii. **Each training must have a location and class capacity.**
   b. **Admin should be able to upload training materials/ Pre and post reading.**
   c. **Admin should be able to create and publish post training surveys**

   Employee Profile:

   a. **Each employee should be able to logon to the training portal.**
      a. **View available trainings**
      b. **Register for a training**
      c. **If the class is full, be placed in a waiting list.**
      d. **Save trainings to Outlook calendars**
      e. **View training schedules for a FY (Mandatory)**
      f. **Select elective trainings.**
      g. **Download training materials.**
      h. **Complete training surveys**
      i. **Get periodic email alerts for upcoming trainings**

   People Manager Profile

   a. **People Manager should be able to view training requirements of its direct reports**
   b. **View training progress of its direct reports**
   c. **Receive alerts of upcoming trainings for its direct reports.**
   d. **Be able to assign additional trainings to its direct reports.**

2. **Succession Planning**:

   Admin Profile:
   a. **Approve successors nominated by People Manager**
   b. In planning succession for the employees, there should be an organogram of all the employees in the organization in order of hierarchy.
   c. Any node on the organogram can be clicked which gives a detailed information of the employee on that node and also list candidates that are qualified for that position (i.e. the position of the employee that was clicked) by looking at the skills required for that position and fetching a list of employees that meet or have those requirements. The

admin HR then decides which employee to promote based on their performance report history.

People manager Profile

a. **Every people manager can select their Successor**
    a. **For internal candidates select from Global Address List**
    b. **For External candidates input**
        i. **Name:**
        ii. **Email address**
        iii. **Telephone number.**
b. **Enter comments for each selection**
c. **State the readiness of the candidate e.g. 1, 2, 3, 4 Years.**
d. **Recommend training requirements to the candidate ready.**

3. **Employee Health:** This module records employees' medical information. If an employee goes to the organizations hospital for treatment, the attending doctor can record the treatment history to that employees account.

Company Doctor Profile:

The information to be recorded include:

a. **Diagnosis:** This contains full description of the doctor's diagnosis of the employee's health status.
b. **Prescribed drugs:** Any drugs prescribed to the employee by the doctor will also be recorded.
c. **Recommendation:** This is the doctor's recommendation to the admin HR for that employee.
d. **The systems should allow for the issuance of am sick leave certificate**

This module is only accessible to the employee and admin HR only.

Admin Profile:

a. **View a report of all request for sick leave (Internal and External) (daily, Weekly, Monthly, Annually) for all staff.**
b. **View medical trends for all employees to analyze health trends within the organizations.**

Peradventure employees goes out for medical attention other than the Company hospital, employees should be able to attach their medical report from their employee portal and await further approval.

People Manager Profile:

a. **View a report of all request for sick leave (Internal and External) (daily, Weekly, Monthly, Annually) for direct reports.**
b. **View medical trends for all employees to analyze health trends for direct reports.**

4. Payroll:

Pay Processing **Manager and Employee Self Service**:

• The system must calculate gross pay, deductions, net pay, employee, and employer contributions for each employee on an effective pay period basis.

• The system must compute gross pay as the sum of each rate of pay times the number of units related to it, minus retirement annuity offsets, if applicable, plus all appropriate allowances and/or other gross pay components, classify and total deductions, subtract total deductions from gross pay, and apply formulas or utilize tables to determine employer contributions required for certain payroll taxes and benefits.

- Regulatory Compliance and Administration: The system must be designed to comply with statutory and regulatory requirements when processing transactions and providing decision support capabilities in accomplishing activities associated with calculating and paying employees.
- Appendix A contains a listing of relevant statutory and regulatory references.
- Functional Requirements:
- Calculate Gross Pay.
- Calculate pay at the end of each pay period after properly authorized inputs have been received from the Time and Attendance Processing Function, and after personnel action processing is completed.
- Process prior period, current, and future period pay actions, based on effective dates.
- Process current-period and prior-period adjustments as an integral part of the payroll cycle.
- Make retroactive calculations based on prior-period hour adjustments, changes to an employee's entitlement (for earnings or deductions) or mass table changes.
- Compute various types of pay entitlements, e.g., foreign and nonforeign allowances, differentials, awards, and premium pay.
- Compute pay for various types of employees, e.g., firefighters, law enforcement officers, emergency medical technicians, teachers, etc.
- Compute earnings amounts or rates for partial pay periods when entitlement dates do not coincide with pay period beginning and ending dates.
- Process earnings adjustments on a begin-date/end-date basis.
- Calculate overtime based on either FLSA or Title 5, as appropriate.
- Calculate differentials based on applicable hours that are certified by an approving official.
- Accommodate information requirements to support supplemental pay actions and recertified checks.
- Calculate allowances, premiums, and differentials as defined by law or regulation. These may be set dollar amounts or computed as a percentage of pay, applying caps or other limitations when applicable.

- Process and compute pay and deductions for multiple positions under different appointment authorities, and different pay, leave, and benefit entitlements.
- Perform statutory limit and reasonableness tests on gross pay.
- Calculate and Apply Deductions.
- Calculate the following deduction types for each employee: 1. mandatory deductions (e.g., retirement, Federal, state, local, and FICA taxes), 22 2. voluntary deductions (e.g., state and local taxes for multiple taxing authorities, life insurance, health insurance, thrift savings deductions, allotments, bonds, and pre-tax deductions for transportation benefits), and 3. involuntary deductions (e.g., IRS levies, garnishments, and administrative debt collections).
- Provide for percentage computation of deductions that are subject to annual or regulatory limits (e.g., the current rate for Federal taxes on supplemental payments, Thrift Savings Plan (TSP) contributions, and Social Security taxes).
- Provide the capability to process deductions that apply in various pay periods and/or have specified limitations, e.g., garnishment pay-off amount.
- Prorate insurance premium deductions for part-time, seasonal, and applicable accessions and separating employees, using the daily pro-ration rule.
- Accelerate deductions for employees paid an annual salary in less than one year (e.g., teachers). Determine when a bond may be issued given its type, denomination, per pay deduction, and balance from previous pay deductions.
- Deduct some items in every pay period and others in selected pay periods only, e.g., discretionary allotments. Ensure that deductions do not exceed gross pay, as established by appropriate laws and regulations.
- Compute the maximum variable deductions for levies, garnishments, and/or offsets based on appropriate limitations of each type of deduction.
- Adjust Pay Calculations. Electronically compare leave, benefits, and payments, for adjusted time and attendance data with prior period data and automatically compute differences. Support payroll adjustments and regular calculations that cross fiscal and/or calendar years, and provide needed information to the core financial and other information systems.
- Subtract deductions calculated in the order of precedence specified by OPM or other laws or regulations, while ensuring that net pay is not negative.
- Follow appropriate rules for taking no deductions within a priority level or partial deductions, if allowed. Adjust taxable gross pay by deducting untaxed items (e.g., Thrift Savings Plan deductions) and civil service retirement annuity offsets. Offset the dollar amount of advanced leave balances (computed at the rate of pay in effect when the leave was taken) against the dollar amount of earnings for pay period of separation and any unused annual leave (based on the current pay rate) on termination of an employee from federal employment.
- Calculate indebtedness for leave advances upon separation. Accommodate requests for waiver of collections for leave advances.
- Maintain each pay record by the pay period in which it was calculated and by the pay period to which it applies (the effective pay period).
- Record gross pay, deductions, and net pay, generating information to update other functions and other systems, as appropriate, including the Standard General Ledger maintained in the Core financial system.

- Capture the overtime rate in effect when compensatory time is earned for possible future payout.
- Maintain individual retirement data, including service history and fiscal history for each employee.
- Maintain data to support preparation of notifications of employee indebtedness, e.g., health benefits. Generate Output.
- Generate payment for severance pay, not exceeding the amount authorized for each employee, on a pay period basis
- Make electronic funds transfer payments as well as other methods of payments, including off-cycle and third party payments.
- Generate payment of unpaid compensation to beneficiaries.
- Accommodate information requirements for accounting transactions for accruals of pay and benefits during the year. This process is to provide for accruing and reversing accounting information relative to pay and benefits on other than a monthly basis.
- Provide a means for correcting accounting transactions for an employee for one or more past pay periods, and for generating adjusting accounting transactions to reverse the improper charges and record the correct ones.
- Make information available to other functions to generate internal and external payroll reports not created directly in the Pay Processing function.
- Use posted time, scheduled tours, and partial pay period computations for accrual processing.
- Provide the capability to track and report pay associated with job-related injury time (continuation of pay (COP)).
- Provide data to establish receivables or follow up on types of leave that may result in an employee indebtedness, including health and life insurance premiums for employees on approved leave without pay.
- Provide information to analyze detailed pay transactions and establish each as either a disbursement or as a debt due the government.