PUBLIC NOTICE OF PROPOSED WAIVER

DATE ISSUED:	July 30, 2024
PROPOSED SERVICE:	Recruitment, On-Boarding and Performance Management Modules
PROPOSED PROVIDER:	Clear Company
REQUESTING DEPARTMENT:	Human Resources

Please take notice of Park City Municipal Corporation's (PCMC's) intent to waive a competitive procurement process. PCMC Procurement Rule 5-3 provides that the competitive procurement requirements may be waived under circumstances where there is a reasonable justification and the waiver is in the best interests of PCMC. The Procurement Official has determined that a waiver is appropriate for a contract for software to enhance ADP and Tyler platforms for payroll and human resources management platform in the amount of $83,938.00 to Clear Company based on the information below:

Waiver Justification:

This waiver is justified under PCMC Procurement Policy 5-3 (2)(a). Clear Company is a preferred vendor for ADP, Inc., our current payroll and human resources management software. Their platform addresses recruitment, on-boarding and performance management deficiencies within the core ADP Workforce Now platform. Clear Company additionally has all integrations set up with ADP, Inc., ensuring a quick and seamless integration.

Additionally, the Human Resources Management platform will be moving to Tyler (Eden) in January 2026 as part of an organizational shift to the Tyler platform. The Tyler platform also has deficiencies in recruitment, on-boarding and performance management. Clear Company is set to integrate with Tyler. The solution by Clear Company is the only software vendor that currently has a system that can address the needs of both platforms.

Attachment below is the SOW.

*To submit comments regarding this Notice of Proposed Waiver, please email Grant Herdrich at grant.herdrich@parkcity.org within seven days of the date of posting.

ClearCompany Statement of Work

This Statement of Work contains the services ClearCompany agrees to complete for Park City (herein referred to as "Client").

Client Name	ClearCompany | Park City Implementation	
Prepared By	Justin Felton	
Date	Jul 22, 2024	
Project Start Date	**Project Early End Date**	**Project Maximum End Date**
September 5, 2024	December 19, 2024 - 15 Weeks from Start Date	January 9, 2025 - 18 Weeks from Start Date**

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Implementation & Support

Implementation comprises a highly organized, phased approach including the development of comprehensive implementation resources including a project plan and roll-out materials. The project plan will serve as a roadmap, outlining tasks, responsibilities, and timelines while roll out materials aid in the introduction and adoption of ClearCompany.

Objectives	Solutions
ATS, Onboarding, Performance and Goals Implementation	- Formal 1 hour Project kick-off call to set goals for the project, following a Partnership Kickoff call with your Customer Success Manager, to establish timeline and responsibilities and to verify the activities to be completed throughout the implementation. - Up to 18, weekly, 1 hour checkpoint calls (over 18 weeks) with the

Implementation Manager. This is allowing for an estimated 5-6 weeks to fully implement each module (Recruiting, Onboarding, Performance and Goals). Implementation is not to exceed 18 weeks.

  - These sessions may cover topics such as: status updates of activities completed, technical and functional questions and advice, process configuration options, best practices and next steps.
- Modules will be implemented in sequential order with one module starting upon completion of the previous module (recommended order is Recruiting, Onboarding, Performance and Goals.
  - Ability to go live with individual modules before all are completed (eg: Recruiting and Onboarding before Performance is completed), if desired.
  - Maximum estimated time of completion for ATS and OB: *November 28, 2024*
  - Maximum estimated time of completion for Performance and Goals: *January 9, 2025*
  - The above estimates are based on a maximum timeline of 9 weeks per module. Your ClearCompany implementation manager can move the project more quickly, if needed.
- Formal 1 hour Project wrap-up call to conclude activities, transfer your account to your CSM, finalize questions and understanding, and set next steps to continue work on any outstanding tasks with designated task owners.
- If needed: Up to 2, 1-hour strategic post-wrap-up calls with IM and/or CSM
- All calls will be conducted via scheduled Zoom virtual meetings.
- Client will go through a series of online learning courses with weekly check-in calls to have questions answered, discuss best practice and configuration options.
  - It is the responsibility of the Client to complete activities assigned to them in between check-in calls in order to keep the implementation moving forward.
- The Client team may include the following Roles and Responsibilities. It’s best to have more than one contact while implementing, to avoid a single point of failure:
  - Project Sponsor: Decision maker of the project. Signs the contract, is aware of progress, and removes obstacles on Client’s end when needed.
  - Project Manager: No formal project management experience needed, simply an individual who will “own” the project and ensure tasks are being completed.
  - Payroll/IT Admins: Individuals who can assist with configuring ADP to integrate with ClearCompany and assist with email whitelisting and posting a ClearCompany careers page.
  - HR Team Representatives: Members of Recruiting, Payroll, etc. who will ensure existing HR processes are set up as desired in the ClearCompany system.

System Configuration	- ClearCompany will configure the following items within the Client's account. Anything additional to the below is the responsibility of the Client to set-up directly.
	  ○ 2 External Application
	  ○ 1 Internal Application
	  ○ 2 Hiring Workflows
	  ○ 5 Texting Templates
	  ○ 10 Recruitment-related email templates
	  ○ 2 Interview Scorecards
	  ○ 5 Offer Letter Templates
	  ○ 10 Onboarding Packets Template with Client provided forms
	  ○ 10 simple custom forms. More than 10 forms may incur additional costs.
	  ○ 5 Review Templates
	  ○ 3 Review Workflows
	- Client to provide all set-up content at the start of implementation.
	- ClearCompany will support up to one round of updates to the above items based on testing feedback.
	- Client is responsible for review and sign off of all configured content.
	- If Client requires content in languages outside of English, translated content must be provided alongside English content for configuration.

Dedicated Team	- A *Senior Implementation Manager* dedicated as your ClearCompany Project Manager to guide the project team through the phases of the implementation and involve additional ClearCompany experts as needed. - A dedicated, *Enterprise Customer Success Manager* (CSM). Your dedicated Enterprise CSM will remain on your account to ensure you continue to meet your strategic goals with us. - A dedicated *Senior Account Manager*. Your Senior Account Manager will ensure you are getting the most from your investment. They will partner with you on growth initiatives and business planning activities. - The Technical Support Team is a team of system technical experts ready to answer your question. Technical Support is also available for Hiring Managers and recruiters across all locations, Monday-Friday 8am-8pm ET. - Unless otherwise stated, all contacts available standard working hours based on their time zone, Monday-Friday.

Training Resources	- ClearCompany Implementation Manager will provide up to 2 live training webinars.
	- ClearCompany will provide tutorial trainings customized to the Client's process from the Training Bytes Menu here:
	  ○ Full Platform - Stock Training Byte Tutorials
	  ○ Up to 20 Custom Training Videos
	- Access to the ClearCompany Learning Center which includes:
	  ○ Short, engaging, targeted learning courses
	  ○ Information presented in multiple ways to accommodate different learning styles
	- Access to the Help Center directly in the ClearCompany system.
	- Live chat available for technical support.

Product Functionality	
Applicant Tracking	
Objectives	**Solutions**

Job Posting	- ClearCompany's requisition creation process supports Recruiters or Hiring Managers opening requisitions from a blank form or from previously entered requisition templates. Job descriptions and other fields are editable once populated in the requisition. Clients can add any number of custom fields to the requisition as needed, which can be free-form text fields, radio buttons, or multiple-selection fields. Multiple-selection fields can be pre-populated with possible selections.
	- When creating a requisition, users have the ability to leverage AI technology to create and refine job descriptions using a generative pre-trained transformer (GPT) embedded into the ClearCompany platform
	    - ClearCompany initiates a job description prompt based on the position title. Users can continue to refine the job description.
	    - Users can choose to:
	        - Accept the output
	        - Undo the results by reverting the job description to the previous state
	        - Erase and start from the beginning returning users to the initial prompt.
	- Approvers for the requisition can be entered in a sequential chain. They can be added ad-hoc during requisition creation, pre-populated from a template, or a combination of both. The listed approval chain is editable if an approver is unavailable.
	- The application to be used with a specific job posting is selected during the requisition creation process, or can be preselected on a requisition template. This application is created and edited by the Client. An application can have custom knockout questions, which remove a candidate from the hiring process entirely. Applications can also have custom questions that assign a specific grade (A, B, C, X) to a candidate based on the desired answer to specific questions in the application. Free text answers and system fields are excluded from autograding rules.
	- Applications support multi-language capabilities including: English, Spanish, French, and Italian. Application content must be translated by the Client.
	- Jobs are posted to Indeed.com, Monster.com, ZipRecruiter.com, Glassdoor.com, LinkedIn.com, and LinkUp.com under the Client's name, as well as the Client's Careers Page.
	    - For more information about the career page, see section called "Career Page"
	    - For more information about branded job postings, see section called "Multi-Branding"
	- Jobs posted to organic (free) postings on Indeed.com are automatically refreshed every 60 days.
	- Jobs can be posted to other sources manually. The ClearCompany system

	will generate source-specific links so you can track the applicant source. - Candidates viewing a job on Indeed.com can take advantage of Indeed's "Easy Apply" function, allowing them to submit their candidacy by clicking the Easy Apply button on an Indeed job posting. - Candidates will be prompted via a notification on Indeed.com that there is a job application that the job poster would like them to complete. Completing the application is not required for their data to appear in ClearCompany. - The simplified job posting process allows for easy posting and will help reach more candidates for the Client's positions.

Career Page	- Candidates can apply to open positions from the career page embedded on the Client's website. ClearCompany integrates into careers pages via:
	    - A ClearCompany-provided Javascript snippet embedded into a Client-hosted web page. This web page will control the styling of the job list view and job detail view for candidates to view open positions, read job descriptions, and enter the application process.
	    - A ClearCompany-provided careers page, embedded through an iFrame, or a Standalone career site linked from the Client's website. The ClearCompany-provided careers page styling is controlled through an editor configured by the ClearCompany team to match the Client's branding.
	    - If the provided embedded option is not desired, clients can design their own career page and utilize ClearCompany's XML or JSON data to provide job listings. The Client is responsible for building this page within their hosted website.
	- The application process does not require any account creation and will allow candidates to apply entirely on a mobile device to decrease the time needed to apply for a position.

Custom Source XML/JSON Feed	- ClearCompany will provide 3rd party job boards with a custom source XML or JSON feed. - The 3rd party is responsible for utilizing the provided feed to post jobs and redirect candidates as necessary.
Candidate Mobile Functionality	- Candidates can complete job applications on the ClearCompany platform via their mobile device's web browser, including reasonably modern smartphones and tablets. - Candidates can respond to text messages initiated from the ClearCompany platform. - Candidates can use their preferred e-mail application to send and receive emails to recruiters and hiring managers and select proposed interview times. - Candidates can view and sign offer letters from a mobile device in addition to completing new hire paperwork.

User Mobile Functionality	- Recruiters and Hiring Managers can complete the following tasks on "smartphone" mobile device's web browser:
	    - Access specific requisitions they are assigned to and review candidate profiles
	    - Change a candidates workflow stage
	    - Email a candidate
	    - Send an SMS message to a candidate

	- Change the grade of a candidate - Forward the candidate to another Requisition or Talent Community - Review Interview Guides - Complete Interview Scorecards
Email Communication with Candidates	- Recruiters and Hiring Managers can communicate with candidates via one-to-one email or bulk email, using free-form text or shared templates for either option. Emails created from templates can be edited by the e-mail author before sending.

SMS Functionality in Recruiting	- ClearCompany provides Text-to-Apply functionality for each requisition a client opens.
	    - The Client will be assigned a pool of 10-digit phone numbers that they will own; no other clients will have access to those numbers.
	    - The Client can activate any of the phone numbers they own for any requisition. The Client then chooses the unique "activation code" (e.g., "JOBS") they'd like to use for that requisition.
	    - A QR code is automatically generated by the ClearCompany system for that requisition, and can be downloaded as needed.
	    - Text-to-Apply text capabilities are available in English.
	- Text messages can be authored and sent by a Recruiter or a Hiring Manager to a single candidate from the Candidate Profile to any candidate whose phone number has a "+1" country code and is specified as being a cell number.
	- Text messages will be sent to the candidate from a "proxy" number, generated by ClearCompany and assigned to each conversation with a candidate at random.
	- When an SMS interaction is initiated with a candidate from a requisition by a Hiring Manager or a Recruiter, that conversation uses a specific SMS telephone number connected to the Client's account.
	- Within a requisition, a candidate will receive all messages from the Recruiter using the same phone number so they have a consistent thread of communications. If a thread is dormant for an extended period of time (usually over a month), it's possible that when the conversation is restarted, a new phone number will be used and therefore a new thread.
	- If the candidate restarts the conversation with a number no longer assigned to their original conversation, their message will still be received by the Recruiter, a new number will only be assigned upon the Recruiter's response.
	- Texting templates can be leveraged to create consistency in candidate communication.
	- Text messages can be sent in bulk to up to 100 individuals at a time. Candidates have to be opted in to receive texts. Bulk texts sent can change a candidate's workflow state. Texts sent in bulk can leverage texting templates or be free-form. The character limit on a text sent in bulk is 320 characters.

Re-Engage with Prior Qualified Candidates	- When opening a requisition, the ClearCompany platform will automatically provide a group of candidates that previously applied to the same Role, in the same location and were dispositioned favorably. - The Talent Communities tool is available for a requisition as long as the requisition is open, and will bring new candidates that

	match the criteria into the search on an ongoing basis until the requisition is closed. - Recruiters can remove the “dispositioned favorably” filter on a search-by-search basis - Results are limited to candidates in the data segment(s) that a User has access to (See section: Data Segmentation for more details) - Drip campaigns can be initiated from within a Talent Community. - Up to 5 emails can be added to a campaign leveraging email templates. - The first email will go out as soon as prospects are added to the campaign but an email cadence can be added for emails 2-5. Cadence selections range from 1 day to 90 days - Prospects added to a campaign will appear in a “Contacted” workflow stage. - Prospects can be removed from the campaign at any point manually or by a prospect selecting the “I’m Not Interested” button found in each campaign email. Prospects that select the “I’m Interested” button within the campaign email will be added to the “Interested” workflow column. - Campaign email contents can be edited while the campaign is running. - Once a campaign has been initiated, it can be stopped. This stops all scheduled outgoing emails. - Candidates who have elected to “opt-out” of notice of future positions on the application cannot be added to a campaign as a prospect. - The most recent email sent is listed in the “Latest Email” column.
Candidate Search by Candidate Name	- Recruiters and Hiring Managers can search for Candidates by first and last name via the main search bar within the system. This will search the entire Client’s account for candidates that meet the search criteria. Results are limited to candidates in the data segment(s) that a user has access to (See section: Data Segmentation for more details). - Within an individual requisition, candidates can also be searched for by first and last name. - There is additional search capability to search for a candidate outside of name. - Hiring managers can have limited candidate search capabilities or have the ability to search all candidates depending on the Client’s defined process. - Recruiters will have the ability to search for a candidate to find them based on their name or via the Advanced Search capabilities. The ClearCompany search platform uses a technique called stemming to identify the root, or stem, of a word. This technique allows variants of a word to be correctly identified during the search process. For example, text, texts, and texting are all identified correctly through our search.
Hiring Workflows	- Candidates can be moved to custom workflows that are determined by the Client. - Macro level workflows are predetermined within the ClearCompany system and cannot be changed. These include: - New Applicants

	- Screening - Interviewing - Offer - Hired - Dispositioned - The Client can customize micro level workflows under these categories. - Workflows can be standard across the board or vary on a role by role basis. - Workflows can be assigned to numerous roles so that it's not necessary to define individual workflows for each individual role.

Former Employee Tag	- ClearCompany will tag a previous employee with a "Former Employee" designation automatically when a candidate applies with the same personal email as a terminated employee.
	    - This tag can also be applied manually by a Recruiter or Hiring Manager as needed.
	    - "Former Employee" tag automation requires historical terminated users to be uploaded via a User import. If this functionality is desired, the Client will provide a list of historical terminations in an Excel spreadsheet, including First Name, Last Name, Email Address Termination Date, and Termination Reason (Voluntary/Involuntary).
	    - ClearCompany's Implementation Team will assist with User Import once data is received from the Client.
	    - Historical terminated employee User import is recommended to reduce risk of re-hiring involuntarily terminated employees.

Interview Scheduling	- In Application
	    - Upon completion of an application, candidates can be presented with a calendar of the recruiter's availability to schedule the initial interview.
	- One-on-One
	    - Send link via email or SMS that provides interviewer's calendar for a candidate to select a time
	    - Recruiters or Hiring Managers can select specific times on their integrated calendar (Gmail or Outlook) and send those specified times to up to 20 candidates at once.
	    - The scorecard selected during the scheduling process will get sent to the interviewer automatically and be accessible via the link found in the calendar invite.
	- Multiple Interview Scheduling
	    - When scheduling panel or back-to-back interviews, interviewer calendars are visible side by side to choose the desired interview schedule.
	    - The scorecard selected during the scheduling process will get sent to the interviewer automatically and be accessible via the link found in the calendar invite.
	- With all scheduled interviews
	    - Calendar invites will be sent to the candidate and the interviewer for the selected date/time and link to the virtual meeting room (if applicable).

Virtual Interview Links for	- Virtual interview links can be automatically populated when an interview is

Interviews	scheduled from the application or with one-on-one interviews.
	- Links are generated using the interviewer's meeting link.
	- The following providers are supported
	    - Google Meet
	    - Microsoft Teams
	    - Zoom
	    - GoToMeeting

Deliver Offer Letters to Candidates	- Users with a specified "Offer Letter Sender" permission can create and send an offer letter to a candidate. - Offer Letters can be templated. The Offer Letter can be edited by the creator before being sent to the candidate. - Offer Letters can go through an approval process, either set within the template or added ad-hoc during the creation of a specific Offer Letter. - The Offer Letter will pre-fill with details specific for that candidate's offer (ex. position title, pay rate) via requisition, candidate and offer letter custom fields. - Offer letters are sent individually from a candidate profile, there is not currently functionality to send offer letters in bulk to multiple candidates at the same time.

Initiate Background Checks to Candidates	- Background checks can be initiated:
	    - From a candidate's profile page, by a user with the "Background Check" permission
	    - Automatically initiated upon a signed offer letter by the candidate
	- The candidate receives an email and can receive an SMS message to complete the background check authorization form.
	- Background checks are automatically submitted to be run by the research team.
	- Background checks appear as pending while the order is being completed.
	- A completed message will appear on the candidate profile once the background check is complete and designated users can be notified via email with status updates.
	- A link to Compliance and Dispute Forms will be present on any pending or complete background check.

Multiple Language Options	- ClearCompany's platform text is available in English, Spanish, French and Italian. - Additional languages can be scoped.* - All custom account content must be provided in the languages required (no translation service available). - Support, training and implementation only available in English.

Onboarding	
Objectives	**Solutions**
Onboard New Hires	- ClearCompany's Onboarding solution can send a predetermined packet of forms to new hires. - Forms can be - New Hire information-only (no signature needed)

	- New Hire mark as reviewed (a "check box signature", with date, time, and IP address recorded in the onboarding packet) - New Hire Fillable form (one or more fields for the New Hire to enter information) - A place for the new hire to upload a document. - ClearCompany maintains a library of US Federal and US State tax forms and select EEO forms that are automatically updated in your account. - ClearCompany also provides a library of commonly used forms, like direct deposit and emergency contact. - In addition to stock forms, the Client can have custom forms. 10 simple custom forms will be developed.* - Custom forms take up to 3 weeks to be developed - Any updates required to custom forms over time must be submitted to the ClearCompany Technical Support team. - Fields in fillable forms can pre-populate with information gathered in Applicant Tracking System requisition fields, candidate fields, or offer letter fields. - The New Hire will need an email address for onboarding packet delivery, and will be required to login with a unique username and password to complete their onboarding packet. - Once packets are launched, packet management is, including hire dates, task assignees and forms, are managed individually by new-hire packet. - Each form will have one internal approver who reviews and then subsequently approves or rejects what the new hire entered. - All forms and Internal Tasks are due on the same date, known colloquially as the "Start Date." - When needed, Start Dates can be updated individually on each New Hire's packet. - Predefined internal tasks may be sent to one existing employee per task to complete as part of the onboarding of a new hire. - Internal and New Hire tasks are considered incomplete until they are marked as "completed" in the ClearCompany platform. - Reminders to complete outstanding tasks are sent to the new hire and to internal stakeholders every 24 hours until the tasks are completed following the Start Date, or until 30 days after the listed start date has passed. - ClearCompany stores all completed online forms and an individual employee's completed onboarding packet can be downloaded from the system once it is 100% completed. - Onboarding packets completed in ClearCompany will be attached to the "Files" tab of an Employee Profile. There is not an option currently to bulk upload historical packets to historical Employee Profiles.
Launch Onboarding Packets to Groups of New Hires	- An onboarding packet can be launched in bulk by users with the Onboarding Coordinator and Recruiter permissions to up to 100 candidates at a time. The User will select Role, Title (If different from Requisition), Hire Date, Office, Department, Manager, and Onboarding Coordinator if needed (otherwise, they will pre-populate based on information from the requisition), and Employee ID can be entered, if known. - Every new hire in the group will receive a customized email template that displays their specific role details and a unique link to their onboarding packet.

Advanced I9 and E-Verify	- ClearCompany uses simplifi-9 as an Advanced I-9 and E-Verify provider. Section 1 of the simplifi-9 I-9 form is embedded directly into the ClearCompany onboarding packet for the new hire to complete.
	    - The employee(s) responsible for completing Section 2 of the I-9 will access simplifi-9's dashboard (via a link in the ClearCompany platform) to complete Section 2 and, if desired, manage the E-Verify process.
	    - Simplifi-9 offers a "Name Your Own Completor" function, allowing clients to authorize a non-employee representative to complete Section 2 of the I-9 on behalf of the company. simplifi-9 levies an additional charge for each use of this functionality and provides support for the service directly to the named Completer.
	    - Once Section 2 on an I-9 has been completed, simplifi-9 can manage the E-Verify process on behalf of a client.
	        - The document information submitted by the new hire and confirmed by the employee that completed Section 2 will enter an E-Verify queue, the status of which can be tracked on the users simplifi-9 dashboard. From that dashboard, the employee can see which E-Verify cases are Pending, Requiring Action, or are Open Cases to be Closed.

Performance & Goals	
Objectives	**Solutions**
Launch Performance Reviews	- Performance reviews can be configured and launched by users with the Performance Administrator permission, and completed by any user with the Performance Management permission - When launching a review, administrators can choose the specific users to be included in and excluded from the review. - New hires can be automatically enrolled in performance reviews when an Onboarding packet is sent to the new employee. Prior to the review launching to the new hire, their review assignment must be confirmed. - Performance Administrators can create their own workflows, review scales, and questions. - Employees will login to the ClearCompany platform to complete their performance reviews, if applicable, as part of the performance review workflow. - Optional Email Notifications will prompt the employee to complete their review in the ClearCompany platform. - Completed reviews will be attached to the Employee's Profile in the ClearCompany platform.
Role-based competency performance reviews	- The ClearCompany platform contains a competency library provided by HRSG that can be automatically pulled into a performance review if they are associated with a role being reviewed. - Clients get access to up to 60 HRSG Competencies and unlimited number of their own custom competencies. - Clients can use pre-constructed roles that are provided with ClearCompany's competency library, or create their own ad-hoc. - Competencies within the library can be modified by the Client.

	- Client is responsible for creating or selecting their competencies from the library and assigning them to their roles, should they wish to use them.

Employee Goals	- Any user of the ClearCompany platform with the Goal Alignment permission can set goals for themselves
	    - Goals are text-based, and have specific start and end dates. Goal descriptions and dates can be edited after creation, if needed.
	    - When a goal is created, the Manager for that employee can be notified via email.
	- Managers can set goals for their direct reports.
	- Goals can be pre-determined based on the role of the employee, and automatically assigned to any new hire in that role.
	- Goals can be aligned to a goal of the employee's Manager
	- The visibility of the goal can be limited in a variety of ways, though the listed CEO of the organization and HR Administrators will always be able to see any goal.
	- Goals are updated by the user they are assigned to
	    - Updates are text-based
	    - Employees can select from set statuses to identify if they are "Ahead", "On Target" or "Behind" on the goal
	    - When a goal is updated, the employee's manager can be notified via email
	- Goal status update and manager feedback reminder emails can be sent on a cadence of weekly, every two weeks, or every four weeks. Alternatively, these reminders can be disabled.
	- Goals can be created, reviewed, and updated on mobile devices.

Employee SMS Notifications	- Clients can utilize Employee SMS Notifications to send out 1-way communications to employees.
	- When a message is sent, the platform captures if that text was:
	    - Delivered - received by that phone number
	    - Failed - not received by that phone number
	    - Pending - still attempting to send communication to that phone number

Employee Recognition	- Shoutouts - Term used for employee accolades within the ClearCompany platform. - Shoutouts can be given to an individual or a group of individuals. - Email notifications can be sent automatically to the individual receiving the accolades and their direct manager. Shoutouts are also recognized on the company newsfeed. - Shoutout reporting allows administrators to see all employees who have received a shoutout and filter by various criteria including date range, department, office, etc.

Surveys	
Objectives	**Solutions**
Employee Surveys	- Pulse Surveys can be configured and launched from the ClearCompany platform by users with the Survey Administrator permission.

	- ClearCompany provides stock survey content, including:
	    - Change Cadet: Diversity, Equity, Inclusion, & Belonging (DEIB) Survey
	    - Diversity Equity & Inclusion Employee Survey
	    - Diversity Equity & Inclusion: 3-question Diagnostic Survey
	    - Emotional Wellbeing & Mental Health Employee Survey
	    - Employee Engagement Survey
	    - Employee Retention Survey
	    - Employee Scheduling Satisfaction Survey
	    - Employee Work-Life Experience Survey
	    - New Hire Experience - First 90 Days
	    - New Hire Experience - First Week
	    - Remote Work Survey
	    - Teamwork & Collaboration Survey
	    - eNPS Simple Survey
	- Clients can create their own surveys using scales and questions of their choosing.

Survey Distribution Options	- Surveys can be delivered to end-users via the following methods
	    - Email - based on email available on user account
	    - Text - based on phone number available on user account
	    - Direct URL Link - link connected to survey and distributed outside of the ClearCompany platform
	    - Client-Generated QR code - Generate a QR code using the Direct URL Link options above connected to survey and distributed outside of the ClearCompany platform
	- Outlined below are various situations to provide user access to login and complete surveys:
	- Surveys can be delivered to end-users via the following methods
	    - Email - based on email available on user account
	    - Text - based on phone number available on user account
	    - Direct URL Link - link connected to survey and distributed outside of the ClearCompany platform
	    - Client-Generated QR code - Generate a QR code using the Direct URL Link options above connected to survey and distributed outside of the ClearCompany platform
	- Outlined below are various situations to provide user access to login and complete surveys:

Reporting

Reporting services provide clients with a centralized and convenient place to view the most important metrics related to recruiting, onboarding, and performance. By leveraging these services, clients gain access to comprehensive analytics that allow them to track and assess key performance indicators in a single location.

Objectives	Solutions

Run Standard & Custom Reports	- Clients will have access to ClearCompany standard reports.
	- Custom reports can be created for a client by ClearCompany using data fields available in the ClearCompany platform.*
	    - Custom reports take up to four weeks to be developed.
	- In the Standard Reporting & Analytics Suite, data walls are respected.
	    - Note that custom reports do not adhere to data walls.

Import Services

Import services allows the client to seamlessly migrate and leverage valuable information from your existing candidate database to optimize recruitment efforts, improve candidate management, and enhance overall efficiency in the hiring process.

Objectives	Solutions

Self Service Requisition & Candidate Import	- Requisition & Requisition Template Import
	    - The Client is responsible for creating all requisitions necessary upon go-live within their ClearCompany instance.
	    - A bulk import can be done for a client by ClearCompany.*
	- Resume Import
	    - The Client is responsible for uploading all resumes to the appropriate requisition.
	- Candidate CSV Import
	    - The Client is responsible for populating the import template and completing the import within their ClearCompany instance.
	    - The Client is responsible for extracting data from their previous ATS and populating the ClearCompany Import Template to the specifications.
	    - A bulk CSV import can be done for a client by ClearCompany. Additional details in the CSV Candidate Import section below.
	- It is recommended that historical candidates that are imported are candidates who would be considered for future positions, and current within the past 2 years. For example, seasonal candidates would be imported to a requisition titled “Historical Seasonal Candidates,” and this pool of candidates could be used when seasonal positions are opened by the Client’s team.
	- Historical candidate data older than 2 years is not recommended for hiring purposes, only for historical reporting purposes.
	- There is no requirement to import historical candidate data into the ClearCompany system.

Integrations	
Objectives	**Solutions**

System of Record Integration with ADP	- Locations in ADP can be setup as Offices in ClearCompany.
	- Departments in ADP can be setup as Departments in ClearCompany.
	    - You have the option of not syncing departments associated with certain Payroll Group Code/s or Legal Entity ID/s.
	- Job Titles in ADP can be setup as Roles in ClearCompany.
	    - These data points are optional to sync to ClearCompany.
	    - If a data point (location, department, and/or job title) is synced, when you add a new entity or update the name of an existing entity in ADP the changes will be reflected in ClearCompany.
	- Employees in ADP will be set up as Users within ClearCompany.
	    - You have the option of not syncing employees associated with certain Payroll Group Code/s or Legal Entity ID/s.
	    - Employee-related fields that can be optionally disabled *after* initial connection are: Role, Supervisor, Compensation Information, personal email, work phone number, mobile phone number, date of Birth, SSN/National ID, Gender, Address
	- Data from ADP will sync to ClearCompany on an hourly basis for updates. Clients have the ability to manually refresh data.
	- Locations/Offices, Departments, and Job Titles/Roles can be included or excluded after the initial connection by the Client, either in bulk or individually.

New Hire Data Transfer to ADP Workforce Now	- Key new hire data will be sent to ADP WFN API endpoints upon one of the following triggers, depending on client preference:
	    - Movement of a/multiple candidate(s) into a specific workflow OR
	    - Upon completion of all tasks in an onboarding packet
	- Client's have the ability to manually trigger the data via the Hire Tab on the Candidate Profile.
	- The Client can choose which ADP New Hire Template the data is sent to via a custom requisition field.
	    - This can include ADP System Templates and/or Custom Templates.
	- The new hire data will create an In-Progress Hire record in ADP, where the new hire will be finalized by a member of the Client's team.
	- Upon finalization of the new hire, emergency contact and direct deposit information will be sent to ADP automatically from ClearCompany, completing the employee profile.
	- For the list of fields and details of the ADP WFN API integration, please click here.
	- Full documents are not part of the Connector and will reside in ClearCompany.

ADP Workforce Now Rehires	- If the Client decides to hire a previous employee through ClearCompany, the employee will be reactivated in ADP Workforce Now and their

	information updated.
	    - Prior to rehiring the employee, the employee must either already exist in ClearCompany in the terminated user list, or they must exist in ADP.
	- The pieces of employee data that will be updated in ADP are:
	    - Department
	    - Office
	    - Job Title/Role
	    - Pay Type
	    - Pay Amount
	    - Pay Frequency
	    - Standard Hours
	    - Legal Address
	    - Supervisor
	- ClearCompany can also rehire them if they are being rehired into a different company code within ADP
	- Any additional fields that need updated will need to be updated in ADP manually by a Client team member.
	- In order to take advantage of this feature, the Client must utilize the ClearCompany Onboarding Module, and all terminated employees will need to be added into the ClearCompany system as terminated employees.
	    - If terminated employees are not added into the ClearCompany System, the Client can utilize the Rehire Functionality for employees rehired after the organization began using ClearCompany.

Additional Integration Capabilities	- When the Client transitions to Eden by Tyler Technologies, there are several integration options. This transition will ensure there is no candidate/employee data lost. - The ClearCompany platform will transition from the inbound data feed from ADP to Eden when desired by The Client. - All integration options with Eden are outlined in the remaining sections.

.CSV	- If the desired Eden integration method, ClearCompany will build a .CSV export file to be used for manual entry or upload into a third party system.
	- ClearCompany will work with the client to determine the information to be included in the CSV file and the appropriate formatting.
	    - If possible, the client will provide a template for the ClearCompany Team to reference.
	- Key data will be pulled into the CSV file upon one of the following triggers, depending on client preference:
	    - Movement of a/multiple candidate(s) into a specific workflow OR
	    - Upon completion of all tasks in an onboarding packet OR
	    - Listed Start Date
	- The client will be responsible for pulling the CSV file at a set frequency with a fixed look back period and either manually uploading the file or keying in the information to the third party system.

Outbound SFTP	- If the desired Eden integration method, ClearCompany will setup a SFTP

	to be used to automate the transfer of data from the client's ClearCompany account to a third party system.
	- The client or third party system will provide ClearCompany with a file template for reference during the build process.
	- The client or third party system will be responsible providing ClearCompany with the follow SFTP credential information:
	    - URL/Host or IP Address
	    - Password
	    - Username
	    - Required File Name Pattern
	- Key data will be sent to the third party system upon one of the following triggers, depending on client preference:
	    - Movement of a/multiple candidate(s) into a specific workflow OR
	    - Upon completion of all tasks in an onboarding packet

Inbound SFTP for User Management	- If the desired Eden integration method, ClearCompany will accept the inbound .CSV file via SFTP protocol to create new employees and maintain those employees.
	- The client is responsible for building the .CSV file to ClearCompany specifications.
	- The client is responsible for determining the frequency of send for this .CSV file.
	- Only employees who are created via the inbound .CSV can be maintained via the inbound .CSV. Any employees created manually cannot be maintained via this method.
	- The following fields can be included in the inbound .CSV via SFTP:
	    - SFTP Vendor User ID*
	    - First Name*
	    - Last Name*
	    - Email Address*
	    - Username (separate from email address)
	    - Status*
	    - Reports To Email
	    - Hire Date*
	    - Department*
	    - Office*
	    - Role
	    - User Admin Permission
	    - HR Admin Permission
	    - Roles Admin Permission
	    - IT Admin Permission
	    - Goal Alignment Permission
	    - Goal Admin Permission
	    - Performance Module Permission
	    - Performance Review Admin Permission
	    - Performance Review Reporting Permission
	    - Employee Permission*
	    - Termination Type
	    - Termination Reason
	    - Termination Date
	    - Tags (must first exist in ClearCompany)
	    - Data Groups (must first exist in ClearCompany)

	- ClearCompany will provide you with a detailed spec sheet regarding the importable fields and the required specifications. - The inbound .CSV file via SFTP will create new offices, departments, and roles if the value does not exist in ClearCompany.
Standard API Access	- ClearCompany will provide API specification documentation to the client and 3rd party vendors as necessary. - Each third party vendor integrating with ClearCompany through the ClearCompany API will be setup with API credentials. - The client or 3rd party is responsible for building to the ClearCompany API specifications.

***= additional cost**
Descriptions of system functionality in this document supersede all previous explanations of system functionality including RFI's, RFP's, emails, etc.

****= maximum end date changes**
Any additional requirements introduced, or changes to the project's scope not stated in this SOW after the project has been initiated, will result in alterations to the project's maximum end date. In most cases, these changes result in an extended maximum project end date. It is the ClearCompany team's priority to keep all projects on-time and on-budget, and also to meet the Client's needs if scope changes are requested during the implementation project. Changes to the project scope will be discussed and agreed upon by the Client and ClearCompany team, if applicable.

Exclusions

- No API Custom Development will be provided by ClearCompany, and no access to the ClearCompany Development Team will be available.
- Functional modifications to the core ClearCompany platform
- Access to ClearCompany Developers for custom development work
- 24-Hour Customer Support
- Onsite visits may be requested by the Client but is outside of initial scope and will incur additional cost of service and travel.
- Any items not otherwise specified in this Statement of Work will be considered out of scope; unless otherwise agreed upon by ClearCompany. Additions to the scope of this project will require a change request and additional fees.