



Request for Information

Registration System for Community and Continuing Education

If you or your business can provide the services herein, please contact
Cheryl Calhoun, Dean of Access and Inclusion at
Cheryl.calhoun@sfcollge.edu.

Thank you for your interest in Santa Fe College.

Request for information for Public Art

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Santa Fe College Information Technology Services Contact	Cheryl Calhoun, Dean of Access and Inclusion Cheryl.calhoun@sfcollge.edu .
Response Deadline	October 15, 2022

Request for Information Only

This request for information is not a formal solicitation and will be used by the College to identify potential software vendors that may align with College goals. The College may also choose not to contact or pursue these services from any or all vendors.

Specifications

Santa Fe College is seeking a software package (Registration System for Continuing and Community Education) that is capable of performing to the specifications herein. If your firm provides software that can meet these requirements, please e-mail the contact above with your contact information.

Specifications follow.

Functional Requirements

1. Student Information
 - 1.1. The system will allow collection the following student information
 - 1.1.1. Name, address, phone, work phone, email
 - 1.1.2. ID number, DOB, Gender, Race
 - 1.2. The system will allow the ability to manage holds
 - 1.2.1. Add, remove, view

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- 1.3. The system will allow merging profiles/accounts when duplicate accounts are detected
- 1.4. Ability to alert student when using an email account already in the database
- 1.5. The system will allow searching for a student by
 - 1.5.1. Name
 - 1.5.2. Phone number
 - 1.5.3. Email
 - 1.5.4. The system will allow autocomplete when searching by name, displaying a list of results matching the entered (partial) name
- 1.6. The system will also searching for a course by
 - 1.6.1. Day, time, Term, instructor
- 1.7. Select Staff will have the ability to reset a student's password
2. Instructor Information
 - 2.1. The system will allow collecting the following instructor information
 - 2.1.1. Name, address (personal), address(business), phone, work phone, email
 - 2.1.2. SFID (SantaFe ID)
 - 2.1.3. Status (Active, Inactive, never Use Again)
 - 2.1.4. Business Information
 - 2.1.5. FID# and SantaFe Vendor ID number
 - 2.1.6. Expertise
 - 2.1.7. Notes
 - 2.1.7.1. Public notes
 - 2.1.7.2. Staff Notes
3. Class Set Up
 - 3.1. The system will allow collecting the following Information
 - 3.1.1. Status (Active, Inactive, Hold, Cancelled Not Paid, Cancelled Paid, Paid for One Hour)
 - 3.1.2. Admin, site, location, building room number
 - 3.1.3. Category, meeting date, change flag
 - 3.1.3.1. Ability to add notes for a change
 - 3.1.3.2. Support time change, room change, etc.
 - 3.1.4. Meeting times, number of weeks, meetings per week, hours per meeting, total hours
 - 3.1.5. Meeting days
 - 3.1.6. Instructor
 - 3.1.7. Payment type
 - 3.1.7.1. Hourly, Volunteer, Contract Per Person, Contract Per Lump Sum, Group Payment
 - 3.1.7.2. Employee discount
 - 3.1.7.3. Payment amount, payment type (regular or seminar, calculated by the system), instructor name

- 3.1.7.4. Alternate Instructors
 - 3.1.7.4.1. Second instructor information
 - 3.1.7.4.2. Third instructor information
 - 3.1.8. Course fee. Maximum seats, minimum seats, registration deadline
 - 3.1.9. Senior waiver
 - 3.1.10. Notes
 - 3.2. The system will provide a planning tool that will allow adjusting the minimum number of students based on a formula
 - 3.2.1. Current formula used: $\text{min seats} = (\# \text{hours} * \text{hourly salary} * 1.25) / \text{regular fee}$
 - 3.3. The system will allow using multiple sections for a class
- 4. Course Setup
 - 4.1. The system will allow setting up a course by providing at least the following information
 - 4.1.1. Course number, title, type (Comm. Ed, Continuing Ed., Online)
 - 4.1.2. Course description
 - 4.1.3. Lab fee
 - 4.1.4. Category
 - 4.1.5. Ability to roll terms and pull course history to create new term
- 5. Registration
 - 5.1. The system will provide the ability to search/filter for a course by
 - 5.2. Ability to set up multiple terms/database (Community Ed, college for kids, REI, Continuing Ed, Corporate Training, etc)
 - 5.2.1. Course name
 - 5.2.2. Category
 - 5.2.3. Availability
 - 5.2.4. Days of the week, time of day
 - 5.2.5. Location
 - 5.3. The system will show course details and present course information at a glance
 - 5.4. The system will allow for a student to register for course via an experience similar with a shopping cart
 - 5.5. When display course details, the system will present information about other related courses that may present interest to the student
 - 5.6. The system will integrate with google maps to show the location of a class
 - 5.7. The system will support adding/managing liability waivers term to term
 - 5.8. The system will allow a student to register on a waiting list
- 6. Financial
 - 6.1. The system will support various payment types
 - 6.1.1. Check, cash, credit card
 - 6.2. The system will allow using waivers (e.g. senior waver), vouchers and employee discounts

- 6.3. The system will allow the awarding of full and partial scholarships
- 6.4. The system will support deferments
 - 6.4.1. Ability to create invoice and mark as paid
- 6.5. The system will support refunds
 - 6.5.1. Ability to drop/add, drop refund and apply payment to a different term
 - 6.5.2. Ability to transfer paid fees to another class
 - 6.5.3. Integration with SF Financials (API)
 - 6.5.4. Ability to do a partial refund
 - 6.5.5. Ability for Bursar Office to approve refunds prior to processing
- 6.6. The system will prevent a student from registering to class without a payment or a deferment with a payment code
- 6.7. The system will support lab fees which will be integrated with SF Financial
- 6.8. The system will allow creating receipts for tax purposes
 - 6.8.1. Receipts will include, class, date, time
- 6.9. The system will use an RBAC (Role Based Access Control) that will allow staff to have fine grained access to certain financial functions
 - 6.9.1. Refunds with Bursars Office authorization once posted to finance system
 - 6.9.2. Drop/add
 - 6.9.3. Partial refunds
- 7. College For Kids
 - 7.1. The system will capture the following additional information
 - 7.1.1. Emergency contact
 - 7.1.2. Lunch option
 - 7.1.3. T-shirt size
 - 7.1.4. Liability Waivers
 - 7.1.5. Photo release
 - 7.2. The system will allow tracking parent and student information separately
 - 7.3. The system will allow registering more than one child at a time
 - 7.4. The system will keep track of whether registration is complete
 - 7.5. The system will allow printing a student's schedule
 - 7.6. The system will implement a waiting list with built in notification system (when a seat is open)
 - 7.7. The system will generate a tax form receipt
 - 7.8. The system will have the ability to view new enrollments by date
 - 7.9. The system will maintain a master list (roster) that provides student registration information and options at a glance
 - 7.9.1. Name, student id, number of courses, periods
 - 7.9.2. Whether the student is registered for all day, AM or PM classes
 - 7.9.3. T-shirt size and lunch option
- 8. Communication
 - 8.1. The system will provide the following in relation to communication with students

- 8.1.1. The ability to email one or all students in a class and add a note
- 8.1.2. The ability to email the instructor and add a note
- 8.1.3. The ability to email rosters and add notes
- 8.1.4. The ability to easily communicate with both students and instructors
- 8.1.5. Ability to send email reminders before a class's start date
- 8.1.6. The system will send class registration receipts that include
 - 8.1.6.1. Class, date and time, trans # and fee amount
- 9. Corporate Training
 - 9.1. Ability to process a group payment using one check, po or credit card
 - 9.2. Ability for a company to register multiple students with one payment
 - 9.3. Ability to create an invoice and mark as paid
 - 9.4. Ability to create certificates of completion
- 10. Reporting
 - 10.1. Ability to convert a report to pdf, excel or word documents
 - 10.2. Ability to directly email a report in one of the formats above
 - 10.3. Ability to generate an information brochure report
 - 10.4. Ability to generate brochure from existing data (word and PDF)
 - 10.5. Ability to print instructor mailing labels
 - 10.6. Ability to print student mailing labels (by term or year)
 - 10.7. Display email addresses by term
 - 10.8. Report unduplicated head count by term or year
 - 10.9. Refunds by course
 - 10.10. Brochure web updates (recap and changes)
 - 10.11. Ability to pull information into SF Forms (Appointment, contract for service)
 - 10.12. Ability to pull student email/address for brochure, flyer, distribution
- 11. Financial Reporting (the actual reports need to be spec'd out)
 - 11.1. Must implement RBAC (role-based access control), to allow for levels of authorization
 - 11.2. Reports specific to a department (say Continuing Ed) should not be visible to another department (say Community Ed)
 - 11.3. Password should not be viewable for certain levels of authorization
 - 11.4. Must have the ability to generate the needed reports
 - 11.4.1. We need specific reports descriptions
 - 11.5. Must have the ability to generate a payroll report (course hours, fee, dates, holidays, instructor pay rate)
 - 11.6. Must include the holidays sections/fields
 - 11.7. Must have the ability to have the "Cancelled Paid" option (paid for one hour if class does not run)
- 12. Payroll Time Sheet Function
 - 12.1. Must have the ability to generate in either pdf or MS Word document format

- 12.1.1. Appointment forms
- 12.1.2. Contract for Service
- 12.1.3. Intent to Teach
- 12.1.4. Welcome Letters
- 12.1.5. Certificates of Completion
- 12.1.6. Waivers liability and photo release
- 12.1.7. Emergency Contacts
- 12.2. Must have the ability to see classes in order, by date or location, with minimum number of students and current enrollment

Technical, Security and Compliance Requirements

1. The application is available as a SaaS or PaaS application and will have no hosting requirements for Santa Fe College
2. The application updating and patching is transparent to Santa Fe College and it is vendor's responsibility
3. The application is supported by most modern browsers (Chrome, Firefox, Safari, Edge, other Chromium based browsers) and is responsive (accessible on a mobile device)
4. The application supports SSO integration with Office 365 (Azure)
5. The application supports and fully implements RBAC (role based access control)
6. The application supports account management and password management
7. The data will be encrypted at transport using TLS 1.2 or above
8. Data will be hosted in data centers geographically located within US
9. Please confirm whether encryption is in place for
 - 9.1. Data backups
 - 9.2. Critical information (PII Information, financial information, if stored by the vendor)
10. Please describe in detail the methodology and techniques used to meet regulatory requirements
 - 10.1. FERPA
 - 10.2. PCI Compliance
 - 10.3. HIPPA
 - 10.4. Data privacy
 - 10.5. Other state, federal and local regulations
11. Please provide a copy of the most recent SOC 2 report
12. Please provide proof of compliance with accessibility standards
13. The application provides a well-documented and well-defined set of APIs that allows bi-directional integration with Santa FE's custom ERP system

Issues

1. SFID numbers
 - 1.1. How to generate them
 - 1.2. SSN and state reporting
2. Disciplinary issues (check for disciplinary issues before allowing registration?)
3. Financial obligations
4. Trespass
5. Various registration flags
6. Communication with eStaff for non-credit (transcripts)

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