



Oak Park Elementary School District 97

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TO: Members, Board of Education
Dr. Carol Kelley, Superintendent of Schools

FROM: Alicia Evans, Assistant Superintendent for Finance and Operations

RE: ALIO Update

DATE: October 25, 2016

Alio was successfully implemented prior to July 1, 2016. As a result, during the audit, financial information was gathered from both Alio and AS400. There were no audit findings concerning balance carryover or confirming the data in either system. Alio is currently being used by accounts payable, payroll, human resources and throughout Oak Park School District 97. Overall, staff members have unfavorable comments about Alio. They cite the additional work that must be done to complete a task and limited reporting as some of the issues.

We are working with our Alio consultants to complete the integration of Alio and Aesop so that the two systems will share attendance and substitute data.

Below is additional information related to Alio:

1. There is a necessary Oracle 12c migration installation that needs to be done by next year and will be installed for us by Weidenhammer. ALIO clients that issue a purchase order and schedule a date for the installation before December 31, 2016 will be charged \$3,000. After December 31, the price will go up to \$4,500. We don't have to install by December 31, but we do have to have a scheduled date in order to receive the discounted price. Kirtley Technology is checking to see if they can negotiate an additional discount for us because we are such a new customer. I will attach the documentation regarding the installation.
2. W-2's will be available this year on the Employee Portal for the first time. We will need to put together some employee instructions, and perhaps send out an email, as well as publish a date when employees will be able to access.

3. We will need to upgrade ALIO to the new release level in December/January to facilitate 1099 and W2 processing for the 2016 tax year. These upgrades are made available on Infolink – our customer support website, typically a week after the IRS finalizes any changes to the W-2 and 1099 forms. We have 2 choices; technology can load the upgrades themselves and notify Kirtley, or we can ask Kirtley to install the upgrades and bill us their hourly rate.

4. There is a Midwest User's Conference for ALIO, held November 2-3 in Wisconsin Dells. We are a little late to register for this year, but might want to consider this for next year. At our request, Kirtley will send a copy of the conference materials.