

## **CUSP Submission: Job Process Tracking Spreadsheet** <sup>[1]</sup>

In Ortho we strive to do work in line with our mission statement. One of our values is transparency, which proves to be very beneficial to the communication within our department. Striving to keep in line with the mission and values of my department, I began keeping an excel spreadsheet entitled “HR Processes” in order to create my own step-by-step process guides for each of my job functions and for each of the processes my position is responsible for. In the course of the year that I’ve worked in Ortho, this spreadsheet has grown to house an individual tab for each function or process that my role is responsible for (around 30 tabs). Examples include Faculty Hiring, Monthly and Bi-Weekly Payroll, Clinical Faculty Appointment, PET Corrections, Recruiting, JobsatCU, Onboarding, Off-boarding, Processing Leave Adjustments, Processing Additional Pay forms, Maintaining a POI, and on and on. Every time I am tasked with a new request or start a new project, I create a tab for the assignment or project in my Excel spreadsheet and begin documenting the steps in the process. Once I’ve completed the steps, I test them the next time I complete the process in order to ensure accuracy and revise them as needed. This comes in very handy for job duties that I only do once every couple of months, because it allows for consistency and compliance with University policies and procedures, and serves to refresh my memory when I haven’t done a certain task or duty for an extended amount of time.

### **HOW DOES THIS IMPACT THE UNIVERSITY?**

This impacts the university by giving me a handy resource that I can revisit and revise and that allows me to be consistent and compliant with University policies and procedures. It helps me meet deadlines with Central HR and Faculty Affairs, by not having to do rework for missing a step and having to go back, for example. If I ever receive feedback that I’m doing something wrong, or skipped an important approval, I can go back to my HR Processes spreadsheet and update it to improve the process and avoid making the same mistake. I also can share my steps and processes with other co-workers or other department administrators to help others become more organized, whether they’re taking over a job function of mine, or enhancing their own position processes. If processes are shared among co-workers, it’s almost like being cross trained on someone else’s duties and allows us to fill in for each other as needed. Another great perk of tracking the processes of my position is that it becomes a great training tool for the next person that takes over my position. I am expecting my first baby in September, and will be going out on maternity leave for a couple of months. Having this system in place, not only leaves a step-by-step trail for the people covering my position while I’m out, but spares me from having to plan and prepare everything before leaving. Because I’ve been proactive, all I’ll have to do is quickly review the processes for accuracy, and provide my co-workers with the file path to where they’ll find steps to complete every job function I do. In a sense, if the steps are followed exactly, it will be like I never left.

# IMPLEMENTATION STATUS

I have been building this spreadsheet since about two or three months into my position with Ortho which began in January of 2012. I have shared my idea with my Director (who loved the idea) and some of my co-workers. I have also shared some of my step-by-step process guides with another department HR Manager, who found them helpful.

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## **Groups audience:**

Controller

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**Source URL:**<https://www.cu.edu/controller/cusp-submission-job-process-tracking-spreadsheet>

## **Links**

[1] <https://www.cu.edu/controller/cusp-submission-job-process-tracking-spreadsheet>