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Agenda

Meeting Date & Time:	October 9, 2014 – 10:00am – 12:00pm
Meeting Location:	1800 Grant Street Rooms 502 & 503
Meeting Facilitator	Lisa Affleck

Discussion Topics

Agenda Items	**Presenter**
Topic 1: Project Status – what we have been doing	Lisa/Lezlie
Topic 2: Review Non-Person Profiles	Cindy
Topic 3: Review Person Profiles	Carolyn/Cindy
Topic 4: Taleo Update	Carolyn
Topic 5: Personal Data Final Changes	Jen B
Topic 6: Paygroup Changes	Lisa/Angelica
Topic 7: Upcoming Business Partner Meetings	Lisa

Action Items (carried until completed)

	Action	**Assigned To**	**Due Date**	**Status**
1				
2				
3				

Topic 1 – Project Status

- Communications
  - ES website has been updated
  - Survey was not well responded to; using different approach with business partners
  - Project has been branded – Elevate
- Customization Documentation
  - Final topics for some will be presented today
  - Have been working with finance on HR GL
  - Working with campus finance and budget folks to revise accounts and how to do fringe allocations
- Hired additional consultants (Benefits, Payroll, GL, Testing, Profiles) through Nov 21
- Integrations/interfaces
  - HCM has approx. 70 that need to be spec'd out
  - Will be creating data governance on HR/FIN side
- SmartERP – selected as forms vendor

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Topic 2 – Non-Person Profile

- Lisa Affleck went to HR directors/campus leaders to review what functionality we will be using. They made the decision to have more structure in job descriptions.
    - Will be building a PeopleAdmin profile template for historical data
    - Individual templates will be created for
        - Faculty/student
        - University staff
        - Classified
    - Would try to build some broad duty statements for HR directors review which can then be added/edited to include more statements
- PS Position Data, training data and Kenexa data will be built into profile
- University and classified staff Job Profile tabs
    - Position summary
    - Duties
    - Competencies
    - Qualifications (can have required and preferred, licenses, etc.)
    - Essential functions (similar to what is in PeopleAdmin right now)
    - Required training
    - Additional information (can select HIPPA, hazardous materials, etc.)
    - HR only (will show what Kenexa position has been matched to)
        - Can it also show if it is a CUPA match? – Yes, This will be included as a separate content type.
- Classified Job profile
    - Includes require examples of decisions/challenges
    - Will have core competencies
    - Will populate classified minimum qualifications required by DPA
    - HR only (can be used to document promotions, etc.)
- Faculty Profile – will be a campus decision as to whether to utilize
    - Campus decision as to whether it is tied to performance management
    - Will be adding an additional information tab
- Student Profile – very basic that will identify required training

Topic 3 – Person Profile

- Person specific
- Data elements
    - Competencies
    - Education
    - Qualifications
    - Duty statements/responsibilities
    - Training
    - Development goals and objectives (will feed from ePerformance)
- Non-person profile data source will feed
    - Competencies
    - Duty statements
- Training data will feed

- Required
- Additional

- ePerformance will feed
  - development goals
  - ePerformance
- Taleo will feed
  - Applicant data
    - Education
    - Languages
    - Licenses
    - Certifications
- Do we know how this will work if someone has 2 appointments?
  - Haven't seen it yet but will be document how that will work
- Will we be able to make some fields mandatory – faculty degrees?
  - Will address it during roll out

Topic 4 – Taleo

- Timeline
  - Last month had 3 day kickoff for recruiting to get requirements and business processes
  - Through November will include data mapping, getting campus signoff,
  - December will have integration development and completing testing scripts
  - January – April 2015
    - User Acceptance testing
    - Kickoff onboarding module
    - Completing PeopleAdmin decommissioning plan (effective Spring 2016)
    - Training plan created
  - May – Nov 2015
    - Full integration testing with external systems
    - Final system adjustments
    - End user training/rollout in advance of Nov. go live

Topic 5 – Personal Data final changes

- Creating a CU custom page that will store CU specific data with effective dating
  - Include privacy flag
  - PERA 140 flag with begin date
  - Background check type (select from drop down) with as of date and expiration date; will allow for additional flexibility should we need to add fields in future
- Highest education level
  - Exists on biographical page
  - Will go back to delivered values that are more generic; will be converting existing data to the generic codes; will also be mapped to positon profile; will have a discussion later about how to use this data
  - Asking HR directors to review data mapping
- Ethnic group
  - Making some changes; will eliminate visually identified field but will add it to the values
- SSN card received – was in 8.9 but was not identified as a requirement and so it has been eliminated

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- Still working on I-9 and eVerify; will present at a later date

Topic 6 – Pay Groups

- Talked about the need to expand the pay groups which would then eliminate some customizations
- A number of things are defaulted based on pay group (benefits programs, earnings programs)
- Proposed 9.2 pay groups
    - Biweekly
        - Students (Graduates & Undergraduates)
        - Temporary – OT Eligible
        - Temporary – Exempt
    - Monthly
        - Faculty – 9 month
        - Faculty – 12 month
        - University Staff – exempt
        - University Staff – OT Eligible
        - Classified – Exempt
        - Classified – OT Eligible
        - Residents
        - Students – Graduates, Teaching Assistants & Research Assistants
        - PreDoc & Stipends
- Faculty split
    - Want academic year faculty split from 12 month faculty
    - Will need to come up with a label that better explains the difference
- Will need users to select pay groups upon hire (drop down)
- Working retirees would fall into either classified, temporary or staff
- Will help to eliminate gray days and improve ES payroll processing time
- Stipends are individuals who are not employees; if a person has 2 different jobs, he would have 2 different pay groups
- Will have a campus compensation group to help decide what do to with different types of pay, jobs, etc.
- Starting in January, the HR upgrade group, Boulder group, etc. will be responsible for collecting questions from campus users
- ES has a consultant working in payroll and we will start to test the logic behind this pay group changes
- Changes in earnings code will be viewed on pay checks

Topic 7 – Upcoming Business Partner meetings

- Will be out on campuses the last week of October
- Received just 24 responses to survey
- Will be conducting a 15 min survey where they can vote using clickers
- May need to have more business partners meetings starting next year to keep them current on the changes

Other

- Our deadline date for the design documents is Nov 21
- If there are topics that are pressing, will need that info by Oct 31 in order to evaluate
- Job, position and time collection will be presented in November meeting

- Kym – the compensation discussion topics are not a customization? Correct – it is a configuration (like forms creation, dashboards, work centers, etc.) and not subject to the Nov 21 deadline
- PETs will be a combination of delivered and configurations
- Will be looking at reporting tools (queries, Cognos, etc.)
- Will there be information shared on Budgets? HR is not responsible for that function, it resides in Finance
- Encumbrances – HR or Finance? Belongs in HR and most likely will replicate current customizations. If there are problems with current process, please notify Lisa Affleck because this needs to be completed by Nov 21
- Will plan to bring to November meeting an update on HR GL/Finance discussions