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Agenda

Meeting Date & Time:	September 4, 2014 – 10:00am – 12:00pm
Meeting Location:	1800 Grant Street Room 502-503
Meeting Facilitator	Lisa Affleck

Discussion Topics	
Agenda Items	**Presenter**
Topic 1: Review Business Process Flow Assignments	Lisa
Topic 2: Review Non-Person Profile	Carolyn/Cindy
Topic 3: Discuss Person Profile Data Flow	Carolyn/Cindy
Topic 4: Discuss Reporting and Reporting Strategy	Lisa
Topic 5: Multi-State Taxation	Lisa
Topic 6: Request for Working Groups (Compensation, HR/GL)	Lisa
Topic 7: Proposed Pay Groups	Lisa

Action Items (carried until completed)

	Action	Assigned To	Due Date	Status
1	Complete the spreadsheet that identifies roles and workflows for various transactions	Kym, Florie, Tracy, Susan	8/29/14	complete
2	Update the action/reason list for the workflow with definitions and context and resend	Lisa A		
3	Get feedback from team on examples of non-person profiles which will be sent out in the next few weeks	Cindy Corwin		
4	Send out the list of working groups for proposed participants	Lisa A		

Topic 1 – Business Process Flow Assignments

Lisa A

- She expected that there would be a lot of questions and appreciated getting the feedback.
- The goal was to reduce the current proposed 85 action/reason codes. The vendor that has been hired for forms (SmartERP) has stated that there will need to be a form for each action/reason.
- There was also some confusion regarding surrounding definitions of the action/reasons on the spreadsheet. Lisa said that she will update the action/reason table with definitions and context and resend.

Topic 2 – Non-Person Profile

Cindy Corwin

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- She has created several templates for non-person profile (faculty/student, university staff, classified staff [in progress]). What is set up in a template will pre-populate the profile.
- Job summary and job duties will be converted from PeopleAdmin. The job duties field in PeopleAdmin is an extensive text field; to accommodate extremely large text fields, we can add additional job duties tabs in profile.
- She is investigating setting up templates for certain jobs like accountant that will pre-populate some generic duties. Campuses can then add to the template any duties that are additional. The template can also have pre-populated competencies, based on those listed in PeopleAdmin or Kenexa.

Topic 3 – Person Profile Data Flow

Carolyn Proctor

- Some person profile data will come from the non-person profile upon hire (foundational and job related competencies and duty statements)
- Applicant data from Taleo could potentially update the following:
  - Education
  - Languages
  - Licenses and Certificates
- Information sourced from Taleo (noted above) would have been validated by the hiring manager/recruiter. What do we do with current employees and those whose hiring is outside of Taleo? Do we allow employees to update this information via self-service? What updates need to be approved?

Topic 4 – Reporting and Reporting Strategy

Lisa A

- Currently our reporting is done using custom and some delivered reports, CIW reports and numerous queries.
- We need to determine our reporting strategy going forward (How do we want to do reporting? Can we use more PeopleSoft delivered reports, now that we are minimizing customizations?)
- We will be asking for individuals to be part of a reporting working group.

Topic 5 – Multi-State Taxation - FYI

Lisa A

- We have a number of employees who work outside the state of Colorado and need to be taxed in the state in which they are working.
- We are looking at third party vendors who can perform the taxation for those individuals, based on the tax rates of those individual states. We will issue the documented quote in spring 2015.

Topic 5 – Requests for working groups

Lisa A

- We have not yet addressed funding because we plan to do it in conjunction with the FIN upgrade team, who are not yet ready to have those discussions. There are a significant number of dependencies that need to be addressed by both groups.
- We are asking you to identify individuals who can work with us in smaller groups as we discuss issues re: compensation and HR/GL, as well as reporting.

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Topic 6 – Proposed Pay Groups

Lisa A

- Currently, we have 3 pay groups (bi-weekly, monthly, retirees who are not working).
- The pay groups default earnings programs (regular earnings codes and hours) and benefits programs
- Because of this limited number, we created a number of customizations to handle defaults.
- We are proposing an expansion of those pay groups that will, in turn, reduce the number of customizations
- The proposed changes are:
  - Bi-weekly
    - Students (graduate and undergraduate)
    - Temporary – OT Eligible
    - Temporary – Exempt
    - Stipend
  - Monthly
    - Faculty – 9 month
    - Faculty – 12 month
    - University Staff – Exempt
    - University Staff – OT Eligible
    - Classified Staff – Exempt
    - Classified Staff – OT Eligible
    - Residents
    - Students – Graduate, Teaching Assistants & Research Assistants
    - PreDoc & Stipends
- The rationale to separate the faculty is to identify those who are eligible for leave accrual vs. not eligible; suggestion was made to change the faculty pay groups to faculty academic year and faculty calendar year.
- There was a comment raised that we should not have a temporary exempt pay group in the bi-weekly cycle. Lisa will generate a list of individuals who are in that category and share with the campuses.