READINESS LEADS MEETING

AUGUST 17, 2017

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
WELCOME
Nancy Jagger
Executive Director, ISC
AGENDA

• Welcome
• ISC Update
• Partnering with the ISC
• Shared Learnings to Date
• Looking Ahead
• Campus Engagement 2.0
• Preparing for Autumn Quarter
• Graduate Student Hiring
• Community of Practice
ISC UPDATE

• During the eight weeks of operations 27,055 cases have been created in UW Connect

• In aggregate, this averages out to ~773 cases per business day or 1.6 cases coming into the ISC every minute we are open for business

• Main topics for inquiries coming into the ISC continue to focus on:
  – Benefits Enrollment/Eligibility
  – Security Change Requests
  – Supervisory Organization Change Requests
  – Time Reporting
  – Request/Correct Absence
  – Payslip/Payment Inquiries
METRICS FROM UW CONNECT

~89 percent of all cases that have come into the ISC are now in a resolved/ closed status (additional progress will be made on this metric in the coming weeks).
WEEKLY ISC CASE VOLUME

Weekly ISC Case Volume

<table>
<thead>
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<th>Week</th>
<th>Case Volume</th>
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<td>WK26</td>
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WK26 Ending 7/1  WK27 Ending 7/8  WK28 Ending 7/15  WK29 Ending 7/22  WK30 Ending 7/29  WK31 Ending 8/5  WK32 Ending 8/12
Partnering with the ISC
Chesca Ward
PARTNERING WITH THE ISC

Ticket Submission
- Emails or voicemails containing as much detail as you’re able to provide
- One topic per ticket

Named Support Contacts
- First line of troubleshooting within the unit
- They have direct access to the HCM Service Partners

HCM Service Partners
- Will review and approve designated transactions, respond to your org’s Workday related inquiries & escalations, provide transactional consultation, etc.

Change Managers
- Partner with units to assist through the ongoing change management efforts
Consistent with legacy processes, a number of functions are initiated and administered at the distributed/department level.

**Initiate in Workday**
- Create Position
- Hire
- Add Job/End Job
- Change Job
- Request Compensation Change
- One-Time Payments
- Period Activity Pay
- Leaves of Absence
- Terminate
- Add/Update/End Academic Appointments

**Initiate via UWConnect**
- Organization Changes
- Job Reclassifications/Edit Position Requests
- Workday Security Requests
- Inquiries
- Issues
- Improvement Opportunities

**Process/Approve in Department**
- Departmental Recruiting Activities
- Create/Distribute Offer Letters
- Organization Assignments
- Costing Allocations
- Contract/End Contingent Worker
- Time Tracking
- Time Off
- Departmental Budget Decisions
The three tiers of the ISC have been divided into sub-groups that are aligned by functional and support service areas.

The organizational structure within each tier and subgroup includes a mix of director, manager, generalist, and specialist roles designed to effectively deliver services to campus stakeholders and support Workday.
Shared Learnings
Cindy Gregovich, Juliette Mirsepas, Paula Ross
Top payroll reasons for errors or delays in payment:

1. Underpayments:
   - Action required by the department prior to payment
   - End Job – compensation removed
   - FTE %
   - Employee entered in Workday

2. Overpayments:
   - Late reporting of leave
   - Timesheet errors

3. Time Reporting:
   - Mass submit and approvals

Beginning the fourth payroll in Workday: Fewer errors! Departments are reviewing provided reports (R0430 and R0431)
SHARED LEARNINGS: BENEFITS

• Downstream process
• Attaching documents
• Integration with HCA
• Backlog of UW Connect
• Special Handling reports
SHARED LEARNINGS: HCM

• Adjusting salary for hourly students
  – Do not add another salary plan- update the hourly section

• Use the hire wizard (but only push the button once!)
  – Missing student numbers because the hire wizard isn’t being used
  – Duplicate records are created if you push in the record twice

• Use R0521 to identify OT time blocks for comp time
Looking Ahead
Nancy Jagger and Jessica Rudy
UPCOMING FIRST TIME EVENTS

ISC Projects Timeline

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<th>July</th>
<th>August</th>
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<td>9/1 – 1/31</td>
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Timeline does not reflect Break/Fix & Change Requests

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
MOBILE SUPPORT UNITS

Shifting our Support Approach

• Go-live MSUs were scheduled by the ISC to provide general transition support

• Going forward, Mobile Support will be more targeted
  – Deployed only when the unit coordinates a request with the ISC
  – Focused on a particular set of issues identified as pain points for the unit
  – Special resourcing around the First Time in Workday events
MOBILE SUPPORT UNITS

How to Request an MSU

• Readiness Lead will submit the request to the ISC by filling out a survey
  – Others may identify needs for mobile support- we ask them to coordinate through the Readiness Lead

• An ISC representative will evaluate the request in order to determine the appropriate representatives to send and duration, and contact the unit to coordinate the meeting time and location
Unit Responsibility

• Before submitting your request and survey
  – Consider your unit’s concerns and assess whether or not you have internal resources that can assist

• What your request should include
  – Ensure that at least 5 participants will be in attendance
  – Provide the ISC with as much detail as possible regarding the session’s attendees and topics to cover

• Once your request is granted
  – Work with your ISC representative to determine the date and time for your session
  – Reserve a conference space
  – Communicate the session around your unit
Campus Engagement 2.0
Elise Barho
BACKGROUND

• The implementation of Workday was undertaken to address the failings of the legacy systems and to enable the University to achieve its long-term strategic goals and objectives.

• HRPM, the project that was undertaken to implement Workday at UW, has now been completed.

  Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.
  – Winston Churchill

• Workday is only the beginning of the transformation of systems, solutions, and services that provide the foundation for the University of Washington.
BACKGROUND

• Workday is implemented and now we must embark upon the journey from operational stabilization through organizational adaptation, resulting in process and solution optimization

• HRPM, the project, was a collaborative partnership of staff from across the University, representing the diversity of business process functionality found across the Schools, Units, and Med Centers of the UW.
  – The project embodied the spirit of collaboration and commitment to excellence that makes this one of the finest public research universities in the world.

• The next stages of our journey must continue this partnership to ensure that we work together to envision and create our future.
TRANSFORMATION

Legacy
- Disparate systems
- Connected through interfaces
- Corrections, if required, are made to each system
- No role based access

HRP
- Program
- Focused
- Finite / temporary endeavor

Future Operational State
- Integrated system
- Holistic
- Corrections made at the entry point of the business process

Workday
FUTURE OPERATIONAL STATE

Business Processes

Organizational Unit Adaptation

WD Upgrades (Semi-Annual)

Roles / People

Deferred Scope

Training / Knowledge

Ticket Backlog

Institutional Policy / Procedure

WD Weekly Updates

Workflow / Approval

Structure

Enhancements

First Time Projects

Communications

Break Fix & Enhanced Customer Service
TRANSITION

• Over the course of the next 12 months we must transition from a Program to a sustainable, high-performance operation.

• To do so requires a shift in:
  – **Focus** from a targeted, temporary endeavor to a long-term sustainable solution for the UW
  – **Mindset** from fixing a transactional problem to finding a holistic solution that takes into account people, process, and technology

• We must move from being ready for change to being the leaders of change to stabilize the operations of the institution and to partner together in the deliberate optimization of the solution which touches all employees.
• During the HRPM Project the campus was engaged in a variety of ways:
  – Partnering in the design, development and testing of the Workday solution
  – Membership in groups: Readiness Leads, Administrative Network, Administrative Council, etc.
  – Governance: HRPLT, Executive Sponsors, etc.

• Engagement during the project was focused through the lens of organizational structure
  – For example, the Readiness Leads represented a unit or set of units on campus
CAMPUS ENGAGEMENT 2.0 – NEXT STEPS

• Still working through how we want to transform our engagement with you

• If you have any input, email ebarho@uw.edu

• Stay tuned for a revised partnership approach
Preparing for Autumn Quarter
Paula Ross
PREPARING FOR AUTUMN QUARTER

- Merit
- Returning faculty from Summer Hiatus
- Faculty Promotions
- Sabbaticals
- Student hiring- hourly and grad students
Graduate Student Hiring
Helene Obradovich
GRADUATE STUDENT JOBS IN WORKDAY

• Everything starts with choosing the correct Job Profile name
  – Job codes used in OPUS are now consolidated into fewer Workday job profiles
  – Example: Research Assistant (E S UAW ASE) covers ALL the former RA/PDRA1/PDRA2 job codes

• The Compensation process now determines both the salary schedule AND the level of the student
  – Tuition waiver and GAIP eligibility are tied to aspects of compensation
  – Specifically, Grade Profile and Step are required components for RA/TA/SA jobs

• Fellowship and traineeship jobs now require a two-step entry process
GRADUATE STUDENT JOBS IN WORKDAY

• Problems we’ve seen this summer include:
  – RA/TA/SA jobs missing Grade Profile and/or Step in compensation
  – Incorrect job profiles
  – Fellowship/Traineeship jobs missing period activity pay for stipends
  – Missing student numbers in Workday
GRADUATE STUDENT JOBS IN WORKDAY

Resources to help with graduate student jobs in Workday

• Graduate School webinars:
  o Wednesday, September 6, 10:30a-noon
  o Thursday, September 7, 2-3:30p
  o Tuesday, September 12, 1:30-3p
  o Information to follow for registration

• Updated User Guides

• Updated information on the Graduate School’s website (in progress)
Community of Practice