

Onboarding Working Group
Meeting 08.29.2018

1. Members

- Vicki Welch, Senior Employee Benefits Representative, Administrative Services Staff, AL-RSCH
- Janie Williams, Assistant Athletics Director (HR), Athletics, TAMU
- Keisha Lamb, Assistant Director Payroll, Engineering Payroll, TEES
- Bianca Ramirez, Human Resources Specialist I, Human Resources, TAMUK
- Lori Barnes, Human Resources Specialist II, Employee Benefits & Records, Tarleton
- Glendis Villasmil, Human Resources Advisor II, Human Resources WTAMU
- Melanie Upton, HR Liaison Administrator, HROE, TAMU
- Andrew Branch, Human Resources Specialist II, Human Resources Office, TEEX
- Toni Nerren, Assistant HR Director, Human Resources, TAMUCC

2. Goals & Process

a. Goals

- i. Assure compliance with federal and state laws and System policies
- ii. Improve the employee's user experience
- iii. Streamline the process
- iv. Adhere to guiding principles to keep the core mission in view, work the same and follow best practices

b. Develop recommendations for further enhancements to Onboarding

3. Upcoming Changes

- a. Move steps constrained by Hire Effective Date to last
- b. Move To Do step to Trigger Additional Data Event
- c. Implement approved HR Partner/HR Contact edits
- d. Edit Onboarding Benefits Questions
- e. Fix notification recipients of integration failures
- f. New job aids and resources

4. Ideas Already Considered

- a. Group by priorities: required, necessary, 'nice to have'
- b. Retitle Onboarding Benefits Questions
- c. Implement Onboarding Dashboard page
- d. Automate the Trigger Additional Data Event
- e. Improve use/awareness of reports

5. Questions/Brainstorm

Suggestions:

- Separate Direct Deposit from Onboarding questions
- Manage Payment Elections – as pre-employee
- Group task by who does the task to reduce back and forth

- Since I-9 is now in Guardian, our new employees are not able to enter anything in Workday until this item is submitted. We are needing this to go ahead and trigger to enter contact info, etc.
- As Pre-Employee (future hire date) Benefits- information tells new employees that they must go to the Benefits worklet to add benefits. However, if they **want benefits to begin on hire date**, worklet is not available – Information to vendors – follow up with Benefits team
- Can the system let the employee know that the onboarding steps need to be all completed and submitted before the next wave of steps are sent. – not clear they can't move forward if they don't submit their current step (stress importance)
- New hires cannot start their own benefits. It's initiated from the Benefits Partner.
- It may be a WD 'thing' but I have seen employees 'save for later' the 'Enter contact Information' to do, and it holds up the onboarding. Employees do not realize what they have done (stress importance)
- That's what I was going to bring up, the emails you get while onboarding "enter contact information" and "enter personal information" was the same thing in my mind (look into terminology)
- Can save for later be removed from enter contact information?
- Do we need to add moving assign pay group to onboarding as one of our topics as well? I know there was behind the scenes conversations but wasn't sure if we needed to add it as well?
 - Can't move to Onboarding – Workday constraint
- I would like to add to instructions on the Photo...we have so many that Save for Later on this and it holds up the process. We would like to add that it is not required and if the new employee does not want to add a photo to go ahead and submit without adding.
 - Or possibly do notification?

Parking Lot

- Can Guardian send emails automatically instead of us triggering? – Parking Lot
- Hire BP - Prompts from WD to approve when an action sits too long
- Hire BP - The ToDo step generates when the employee is a Pre-Hire record only. Our concern is we cannot edit the system ID to enter a UIN while at that stage. This creates issues for employee entering the system ID, can the UIN be entered into the pre-hire record to automatically generate into the Employee record?
- Is there a hire status report similar to the onboarding status report so an HR Contact/Partner can see where things stand? It's hard to prep for group onboarding sessions when we don't know how far each one is in the hiring process.
 - BP Awaiting Action Report
 - Hire Dashboard