

# Working Group Name

## Meeting Minutes

Date: 06-11-2020

Time: 2:00 pm

Location and/or WebEx

### 1. Welcome & Roll Call

Name		Name		Name	
Scott Bauer (TAMU)	X	Brandy Kosh (TAMU)		Bridgett Chargois (TAMU)	X
Gari Jones (AL-EXT)	X	Elvia Olivia (TTI)	X	Toni Nerren (TAMUCC) Debra Cortinas Proxy	X
Charlotte Banks (TAMUT)		Patricia Morgan (TAMUSA)	X	Tina Flores-Nevarez (TAMUCT)	X
Tammi Thompson (TAMUC)	X	Trudy Hanson (WTAMU)		Joni Foster (TAMUSA)	X
Kami Xiong (WDS)		James Ross (WDS)	X		

9 of 12 Members in attendance

### 2. Action Item Review

- a. Nothing reviewed in this meeting.

### 3. New Items

- a. Reporting and Dashboards:
  - i. Performance Review Process (All) reports update to give better prompts for filtering results.
  - ii. Performance Report title audit for clarity and understanding.
  - iii. Look at some new custom reports on Goal creation, status of goals, and goal approval process status.
  - iv. Due to security restraints on the Complete Manager Evaluation stage of the performance review business process an employee may not be able to see the status of their review and who has the current task on their review. They are not able to see the status when the manager has the task. Is there are report we can create for the employee to see the status which they can see in their process history. Look at granular security to all the employee to see the status, but not the review information as it was changing.
- b. Discussion: Update the Get Additional Manager Review Business Process security policy to add Talent Partner and Talent Partner View Only Roles to the "view all" rights for this business process. This will allow the Talent Partners to see who a Manager has added to the review as additional managers to provide content.

- i. The group unanimously agreed to move forward with voting today on providing a recommendation to allow this access to Talent Partners.
- ii. Vote:
  - 1. Do we move forward with recommending this Talent Partner and Talent Partner View Only security change to View all Actions on the “Get Additional Manager Evaluation for Performance Review” BP to the HCM Advisory Committee for approval.
    - a. I approve this recommendation 9/9 (100%)
    - b. I do not approve of this recommendation 0/9 ( 0%)
  - 2. The Recommendation will move forward for approval at the HCM Advisory Council meeting in August.
- c. Discussion: Layout of the Performance Review Business Process regarding the sequence of the Get Additional Manager and Get Additional Reviewers steps.
  - i. James presented to the group that the Get Additional Reviewers step should be first and Get Addition Manager step should come in after the self-evaluation is completed, having the Get Additional Managers step come in after the self-evaluation is complete would allow Additional Managers the ability to see the ratings comment the employee entered on the self-evaluation.
  - ii. The Group did not have concerns about this, and James would continue forward with testing and bring a demo to the group for a presentation of what the new business process might look like and how it would function.
- d. Discussion: Review the option to add a Questionnaire to the Performance Review Business Process that asks the Primary Manager if they want to include additional reviewers and additional managers on the review.
  - i. The questionnaire would ask them two question if they are going to want to add additional managers and/or additional reviewers. Depending on how they answer will determine if the Get Additional Manager and or Reviewers step will launch or be automatically skipped in the business process.
  - ii. The Group thought this might be a good option for some. The percentage of users that actually use the Get Additional Managers/Reviewers is pretty low, according to some of the working group members. This questionnaire might reduce some of the confusion for end users and not require them to manually skip the task. Some of the group would rather see the steps completely removed, but for some that want to keep the additional reviewer/manager steps this might be able to simplify things.
  - iii. James will move forward with testing and demo the questionnaire step as an add-on to the business process. Research can the Business Process sequence have all the additional steps come

without having them wait on the self-evaluation to complete first?  
Look at the notifications on the completion of self-evaluation step,  
what does a manager get and when?

- e. Discussion: A new set of review templates without the get additional manager/reviewer steps included.
  - i. Discussed what V3 for each current template might be, which could include templates that could be designed without the get additional manager/reviewer data piece in the template. But as discussed we would only move forward with this if multiple members would utilize this type of template. The maintenance on templates can get out of hand really quickly when every member has their own review template. It is best to try and work the same as much as possible in this regard.
  - ii. An alternative to creating these new sets of templates is to bring in some validation rules on the business process steps for the get additional manager and get additional reviewer steps which would block the steps from triggering for system member companies. The system member would have to decide that they are in or out of utilizing the get additional manager/reviewer steps. Using the validation on the business process steps would eliminate the need for extra templates taking the same steps out. James will test some other test some other validation rules for additional filtering beyond just company.
  - iii. Those that want to keep the get additional manager/reviewer step could utilize the questionnaire to simplify the manual skipping requirements of managers.
  - iv. Discussed that there is a new user interface coming from Workday.
  - v. Look at the verbiage of Manager/Employee Review Meeting section, to include question content and instructions.
  - vi. James will continue to test and develop the validation option allowing companies to opt out of the get additional manager/reviewer. Review the titles of the review. Review the sequence of sections on the review?
- f. Discussion: Take a look at the Set Review Content Process, which allows the manager to handle the review first giving them the opportunity to update content on the review prior to the employee completing the self-evaluation.
  - i. The working group did not show interest in this topic and will put it back on hold for the time being.
- g. Discussion: Talent Partner security access on the following topics
  - i. The ability to cancel or rescind the tasks of get additional managers/reviewers (currently only Talent Admin has access)

- a. The ability to cancel or rescind the tasks of get additional managers/reviewers (currently only Talent Admin has access)
  - i. There are times that a manager may submit these and have added the wrong person to as a reviewer or manager and they need to be canceled.
  - ii. There may be a request to cancel them prior to them being completed.
- b. This change will only give the TP the ability to cancel or rescind this Get Additional action.
  - i. Will not require having to go to the Talent Admin to make these changes.
- 1. Group believe that it would beneficial for Talent Partners to have this access.
- ii. Give the Talent Partner the ability to manually send back a review to help with manager change issues.
  - a. A Common Occurrence is that Reviews get out of sync when there is a manager change while there are actions awaiting the manager in their inbox for performance reviews.
    - i. Get additional manager reviews
    - ii. Get additional reviewer
    - iii. Complete Manager Evaluation
    - iv. Provide Manager Acknowledgment step
  - b. Workday does not auto correct to the right manager unless the step they are in re-triggers
    - i. Most of the time the easiest is to manually send it back a step and then let the step be resubmitted and this correct who the review is going to.
  - c. Caution this also gives the Talent Partner the ability to send the completed reviews back into the review process. (currently only Talent Admin has access)
    - 1. Group believe that it would beneficial for Talent Partners to have this access.
- h. Discussion: Update the help text on the Get Additional Manager for Review step to state that the Manager can only add two additional Managers to provide comments.
  - i. The group agreed that it is okay to update the help text. James will present the updated text at the next meeting

- i. Discussion and Action: Create Two Sub-Committees, to help parse out some details of topic between meetings, to speed up decision making in the working group
    - i. Sub-Committee: Instructional and on-screen help text review and FAQ creation
      - 1. Gari Jones
    - ii. Sub-Committee: Reporting and Dashboard Review in conjunction with WD Reporting team
      - 1. Scott Bauer
      - 2. Tammi Thompson
4. Questions/Comments
5. Next Steps
- a. Kami Xiong review the reporting needs of the members.
  - b. James Look at granular security to allow the employee to see the status, but not the review information as it is changing.
  - c. James move forward with the updated sequence of the Get Additional Manager and Reviewer steps for presentation at the next meeting.
  - d. Performance Review Business Process and Questionnaire
    - i. James will move forward with testing and demo the Performance review questionnaire as an add-on to the business process.
    - ii. Research the advancing of the managers task without waiting for the completion of the self-evaluation.
    - iii. Can the Business Process sequence have all the additional steps come without having them wait on the self-evaluation complete first?
    - iv. Look at the notifications on the completion of self-evaluation step, what does a manager get?
  - e. Performance Review Templates
    - i. Look at the verbiage of Manager/Employee Review Meeting section, to include question content and instructions.
    - ii. James will continue to test and develop the validation option allowing companies to opt out of the get additional manager/reviewer.
    - iii. Review the titles of the Performance Review Templates.
    - iv. Review the sequence of sections on the review?
  - f. James to do the security testing and working group members will discuss with those they represent these security changes for their feedback to be voted on at the next meeting.
    - i. Give the Talent Partner the ability to manually send back a review to help with manager change issues.
    - ii. The ability to cancel or rescind the tasks of get additional managers/reviewers (currently only Talent Admin has access)

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- g. James to assign the rest of the working group to a subcommittee.
- h. James to bring the updated instructional text to the next meeting for a vote.

Next Meeting: Mid July 2020