

Onboarding Working Group

Meeting Minutes

Wednesday, September 9, 2020

1:00 – 2:00 pm

WebEx Meeting

1. Welcome & Roll Call

Name		Name		Name		Name	
Jana Smith		Wendoline Harrell	x	Michelle Newton		Glendis Villasmil	
Lori Barnes	x	Robin Elliot	x	Tina Pennington	x		
Vicki Welch	x	Scott Witherell (for Janie)	x	Toni Nerren	x		
Keisha Lamb	x	Melanie Upton	x	Bianca Ramirez	x		

2. Action Item Review (5 minutes)

a. Onboarding Dashboard after action review

- Not getting as many questions to answer; feels like its gone smoother since implementing the dashboard.
- Website common tasks pages
 - Page views for Employee Common Tasks has averaged about 25 hits a day. Sept 1 was the highest day with 82 page views. (July 1 – Sept 3)
 - We are seeing a lot of the referrals to the common tasks pages from Workday. If a user right clicks on the link, however, it shows as a direct referral, so we may not be getting the most accurate count.
- TrainTraq Courses – Waiting on reports. Will provide update via email.

3. New Items (45 minutes)

a. Education in Workday for compensation purposes

- Have the numbers increased since the Onboarding Dashboard was configured?
Is a follow up notification needed?
 - Helpful when it is there, but haven't heard anything from members on a need for additional notifications or steps to gather information
 - For promotion, multiple system members require new degree verification or submission of an updated resume
 - Another member requires to employee to enter Education and work experience before being eligible for merit. Started a couple of years ago.
 - Example forms uses for requests to changes in positions:
 - a. <http://hr.tamucc.edu/compensation/assets/position-review.pdf>
 - b. <http://hr.tamucc.edu/assets/internal.pdf>

*Group members are going to discuss this those they represent to see if there is a need for additional notifications or configuration by the Workday Services team

b. Binary Rule to HR Partner or HR Contact on Absence Steps in Onboarding – brought up after/during the Staffing Part 3 Webinar (Onboarding)

- Update Time Off Service Date
- Confirm Prior State Service
- Restoration of Sick Time Off

*After discussion, the group feels that the routing for these steps should remain as is

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4. Questions/Comments

(5 minutes)

- a. Still seeing issues when new hires are skipping ahead to benefits before finishing Onboarding
 - a. Recommended that system members point their new hires to the Onboarding job aid on the Workday Help Website.
- b. Still seeing issues when new hires are not completing Onboarding before payroll runs and payroll has to mail checks because Onboarding isn't complete.
 - a. Monitor the Onboarding Status Summary Report to encourage employees to get their Onboarding Complete. Refer them to the Onboarding Dashboard to monitor their own progress.
- c. Also having issues with employees being confused about adding Usage and Primary Phone during onboarding steps.
 - a. Refer to the help text on the Onboarding steps
- d. Virtual Onboarding has been challenging; some struggles with getting Onboarding completed
- e. Quarterly meetings are working for the group

5. Next Steps

(5 minutes)

- a. Review the Governance page on the Workday Help Site for Region information. Remember to reach out to other members you represent.
- b. Follow up with additional stats on TrainTraq courses taken
- c. Share knowledge of the Onboarding job aid (for the new hire) and use of the Onboarding Dashboard and Onboarding Status Summary Report to your members and those you represent.

Next Meeting: 12/08/2020