HCM Advisory Council

October 17, 2023

Maintains the integrity of the Workday application and provides cohesive functional and technical support to maintain and achieve improved processes and lower operating cost

Council Members

Cheryl Greene	x	Keisha Lamb	x	Martha Gonzalez	
Joe Corn	p	Wendoline Harrell	x		
Laura Dohnalik	x	Eva Lopez			
Lona Warren	x	Tammi Thompson	x		
Elizabeth Schwartz	x	Derek Gonzales	p		

Proxies:
Laura Quirino for Joe Corn
Jacqueline Flowers for Derek Gonzales

1. Review Previous Meeting Action Items
    a. Proxy Members
        i. Laura Quirino proxy for Joe Corn
        ii. Jacqueline Flowers proxy for Derek Gonzales
        iii. Martha Gonzalez vote in absentia provided 10/16/2023
    b. Review Quarterly Key Performance Indicators (KPI)
        i. Support Resolution – 95.9%
        ii. Customer Satisfaction – 98.4%
        iii. Enhancements – 93.8%
        iv. Application Quality – 95.1%
    c. HCM Advisory Council Charter (Brad Blair)
        i. October – Complete draft
            1. Proposed changes to HCM Advisory Council
                a. Define Charter
                b. Representative from Each Member
                c. Consistent Terms for Representatives
                d. Opt In/Out during voting in Council Meeting
            2. Review Timeline for Charter Ratification
                a. Elizabeth S: Is this moving forward, or will there be a vote on the charter? Has the decision been made already to expand representation?
                   -Brad: The decision is not finalized. Discussion is still open. The documentation is a proposal and no decision has been officially made.
        ii. November/December – Council Review of Draft
        iii. January – Ratify Charter in Council Meeting
    d. Workday Succession Planning (Amy Suter)
        i. provides overview of Succession Planning
        ii. summarize functionality decisions made by succession planning group
        iii. review timeline of Succession Planning. Targeting Nov. 30 launch.
            1. **Q:** How can we access the dev tenant to test?
               A: Please attend meeting today if available. Additional training and access to testing tenant will be provided through the meeting.
            2. **Q:** Is there anyone that has access?
               A: Confirmed some have access and have been testing.

2. Priority List – Announcements (Brad Blair)

- 21425190   Add Detailed Disability Information for Dependents (Meredith Fox)
- 23566167   Update Veteran's Employment Preference (Amy Suter)
- 23591436   Project report created (Amy Suter)
- 23591605   Create Worker Education custom report (Amy Suter)
- 23664854   Compensation Pay Ranges Updated (Sri Kamarthi)
- 23664908   Market data from CompAnalyst into Workday – Update (Sri Kamarthi)
- 23690722   New Employee Withholding Order Process (Sri Kamarthi)
- 23705086   Emergency Communication Email & Bryan Location Updates (Pamela Gentry)
- 23847266   Transition to WD Delivered Dependent Verification Fields (Meredith Fox)
- 23857893   Active Job Applications enabled for Recruiting roles only (Amy Suter)

3. Priority List – Proceed and Prioritize Items (Brad Blair)

Request	Area	Task Name	Proceed	Priority
23658524	Absence Management	Create notification to Employee to warn of upcoming expiration of State Comp Time	Yes	2
23658544	Absence Management	Create notification to Employee when they will become eligible to use vacation	Yes	3
23658550	Absence Management	Create custom reports so UIN can be added	Yes	2
23658602	Absence Management	Move Absence Partner To Do to after completion step in termination business process **launched poll 23658550	Yes	2
23658688	Absence Management	Update Absence Partner To Do in Change Job business process **launched poll 23658602	Yes	2
23697303	Absence Management	Create notification to Absence Partner when employee has taken greater than 3 days of sick time **Vote completed off cycle**	Yes	2
23757373	Absence Management	RFP for FMLA software tracking	Yes	1
23658257	Performance	Updates to Performance Review Acknowledgement Audit report	Yes	2
23252911	Recruiting	Create Close Job Requisition Reason "Position Filled"	Yes	2
23658298	Recruiting	Turn off Inbox items for Screen step	Yes	2
23658321	Recruiting	Turn off notifications for the Screen step	Yes	1
23658408	Recruiting	Enable Primary Recruiter role & update reports to include Primary Recruiter if assigned	Yes	2
23697317	Recruiting	Revise Change Job and Add Job step routing **Vote completed off cycle**	Yes	1
23697325	Recruiting	Remove the Manager's ability to take action from the grid **Vote completed off cycle**	Yes	1
23697334	Recruiting	Enable "Active Job Applications" functionality on Candidate Profiles **Vote completed off cycle**	Yes	2
23748351	Recruiting	Add "Declined Offer - Compensation is insufficient" disposition reason to Background Check step	Yes	2

23784854	Recruiting	Opt in/Opt out of "Create and/or Manage Interview Settings" To Do in Job Requisition and Job Requisition Change business processes	Yes	1
23358441	Staffing	Contract Contingent Worker Onboarding - Do Not Trigger Edit Passports and Visas & Edit Government IDs Tasks	Yes	2
23743897	Staffing	Modify Change Job Steps Routing to Initiator	Yes	2
23744077	Staffing	Modify Add Additional Job Steps Routing to Initiator	Yes	2
23744173	Staffing	Modify End Additional Job Steps Routing to Initiator	Yes	3
23746404	Staffing	Add Warning in Termination for 5 Year NEFR Policy	Yes	2
23746620	Staffing	Add HR Partner to Alert 30 Days Before Flexible Work Arrangement Expiration	Yes	2
23747010	Staffing	Implementation of HR Hub	Yes	3
23852085	Staffing	Remove Hire Compliance Checklist and Move Education Verification to Existing To Do	Yes	1
23852307	Staffing	Member Opt-in/out Form I-9 To Do(s) in Hire	Yes	1
23852641	Staffing	Extend 45-Day Hire Window to 60 Days	Yes	1
23697341	Talent	Remove Employee To Do in Goal Setting business process ****Vote completed off cycle**	Yes	2
23697356	Talent	Remove Performance Review business process due dates ****Vote completed off cycle**	Yes	1

Priority List Discussion

21425190   Add Detailed Disability Information for Dependents (Meredith Fox)
- Confirm SBA making the updates in the system?
  - SBA will maintain the disability status in Workday.

23658544   Create notification to Employee when they will become eligible to use vacation

- Will the alert have the date they become eligible?
  - Yes the time off service date will be included in the notification. A report is created to find the eligible population and drives an alert in Workday

23658550   Create custom reports so UIN can be added

- Can emails also be included?
  - Yes once the report is custom, email can also be included
- Workday Services will create the report?
  - Yes, the WDS/Reporting team will create the new reports
- Will the manager's information be included or should it?
  - This vote is specific to whether we should move to custom reports. The Specifics of which fields should be included can be discussed in working group

23658602   Move Absence Partner To Do to after completion step in termination business process

- Can we add the donation to sick leave pool to Workday instead of having everyone do that outside of WD?
  - Workday still does not have the functionality for sick-pool hours

23757373   RFP for FMLA software tracking

- Is this a product partner that integrates with Workday?
    - This would be outside of Workday. If proceeding, further research can be done regarding integration with Workday.

23658298   Turn off Inbox items for Screen step

- What is the reason this is needed?
    - Managers are not following policies or are making mistakes in selection. Steps will be managed by Recruiting instead.

23658408   Enable Primary Recruiter role & update reports to include Primary Recruiter if assigned

- Who assigns the role?
    - Recruiting partners or recruiting coordinators
- Member suggestion: Should be recruiting partner
- Will the selectable people be those who are currently recruiting coordinators or can it be anyone?
    - Testing was done using recruiting partners/coordinators. Additional security is not being assigned to the role so they would need a recruiting role to be able to see information.

23748351   Add "Declined Offer - Compensation is insufficient" disposition reason to Background Check step

- Why does this have to be reason specific? Wanting more generic options.
    - The offer step if being used does have generic options. This was a specific request to track losing candidates due to compensation.

23784854   Opt in/Opt out of "Create and/or Manage Interview Settings" To Do in Job Requisition and Job Requisition Change business processes

- I want the step to go away.
    - Make sure to opt-out in the survey

23746404   Add Warning in Termination for 5 Year NEFR Policy

- Is this only when you're placing the NEFR flag or is this later?
    - It is at the beginning of the process and only HR Partner can add the flag so it is they who will be seeing the warning.
- Can verbiage be included that wil must be approved by HR?
    - Only HR Partner can add the flag. Yes, verbiage can be included as needed.

4. Discussion Items (Workday HCM Advisory Council)
   No discussion items.

5. Next Steps (Brad Blair)
   a. 90 Day Roadmap Refresh – October 31, 2023
   b. Next Workday HCM Advisory Council Meeting – January 16, 2024
       i. **Q**: Is that the first day of classes?
          A: Will confirm and update meeting date if needed.