



Office of Information Technology
THE TEXAS A&M UNIVERSITY SYSTEM

Maintain the integrity and continuous improvement of the Workday application by reviewing, voting, and prioritizing enhancements that meet the organizational needs of the A&M System stakeholders.

Workday HCM Advisory Council
 April 16, 2024
 9:00 am – 11:00 am

Council Members

| | | | | | |
|-----------------------------|---|---------------------------------|---|--------------------------|---|
| ALEXT - Joy Bading | X | TAMUCC - Jacquelyn Flowers | X | TEES - Kelsey Mirth | X |
| ALRSCH - Elizabeth Schwartz | X | TAMUCT - Tina Flores-Nevarez | X | TEEX - Wendoline Harrell | X |
| PVAMU - Cheryl Greene | X | TAMUCT - Tammi Thompson | X | TFS - Kristen Suehs | X |
| SO - Dawn Santo | X | TAMUK - Derek Gonzales | X | TTI - Leslie Simental | X |
| TAMIU - Claudia Martinez | X | TAMUSA - Martha Olivia-Gonzales | X | TVMDL - Jasmin Alvarado | X |
| TAMU - Joe Corn | X | TAMUT - Charlotte Banks | P | WTAMU - Warren Pitt | X |
| TAMU - Laura Dohnalik | X | TARL – Amy Browder | X | | |
| TAMU - Shelly Janac | P | TDEM - Maggie Freeman | X | | |

Proxies:

Natalie Bryan for Charlotte Banks
 Laura Dohnalik for Shelly Janac

1. Review Previous Meeting Action Items

a. New Member Welcome

- Priority List - Announcements: items that have occurred between Advisory Council meetings, may be forward or backward looking but act as way to inform HCM Advisory Council of what has occurred.
- Priority List – Proceed & Prioritize: items proposed to HCM Advisory Council. These Enhancements can come directly from members via service tickets, Working Groups, Workday Services team, as well as Workday scheduled releases and updates.
- Proceed and Priority are determined by majority vote, with Brad serving as tiebreaker if needed.
- Opt-ins and choices associated with priority list will be captured during meeting.

b. Review Quarterly [Key Performance Indicators](#) (KPI)

- KPIs are metrics to measure organizational success. Evaluated on a quarterly basis and publicly available on Workday Help Site – About – Governance
 - Support Resolution – **93.7%**
 - Percentage of tickets opened and resolved in the period.
 - Customer Satisfaction – **97.8%**
 - Percentage of customer feedback ratings of neutral or higher
 - Enhancements – **93.8%**
 - Ties directly to HCM Advisory council: percentage of priority 1 and priority 2 changes that are approved by the council and completed in the quarter. Target is 80% due to project scope or timing requirements for releasing changes.
 - Application Quality – **94.1%**
 - Percentage of change requests completed without defect in the period.

2. Priority List – Announcements

- **25038247** – New I-9 Information Report
- **25144582** – Create Benefit Alerts for Employees & Retirees turning 65
- **25145030** – Update to Time Offs to allow corrections when Employee no longer eligible
- **25170524** – Require Email Address on Pre-Hire Profiles
 - If Prehire, do they have email yet?
 - If they came from recruiting, their email will be personal email address automatically associated with the candidate record.
 - During onboarding, new hire prompted to enter contact information so can update email with work email or add work email.
 - If creating a direct hire, the processor will enter candidate email as required field.
- **25186146** – Move Military Status to Veteran Status Identification for Converted Workers
 - Are both state and federal veteran identifications in place?
 - Worked with OGC/System Office: information has been updated; federal and state identification are in place?
 - Any impacts to reporting?
 - No impacts to reporting because identification carried into correct identification type.

3. Priority List – Proceed and Prioritize Items

| Request | Area | Task Name | Proceed | Priority |
|----------|--------------------|---|---------|----------|
| 25071445 | Absence Management | Update Medical and Mental Health Care for Certain Veterans and Mental Health Leave for Peace Officers and Telecommunicators | Y | 2 |

| | | | | |
|---|--------------|---|--------|---|
| 25075865 | Compensation | Share One-Time Payments Report with HR Contact | Y | 3 |
| 25075913 | Compensation | Allow Faculty Additional Jobs with no compensation | Y | 3 |
| 25072095 | Recruiting | Remove Schedule Interview step in Interview business process | Y | 2 |
| 25072140 | Recruiting | Remove Manage Interview Feedback step in Interview business process | Y | 2 |
| 25072172 | Recruiting | Remove Complete Questionnaire step of Reference Check business process | Choice | 2 |
| 25072205 | Recruiting | Move Get Approval for Proposed Offer step to prior to the Compensation step in the Offer business process | Choice | 3 |
| 25072975 | Recruiting | Create new disposition reasons | Y | 3 |
| 25072975: after discussion, proceed with vote on this enhancement, but this enhancement will not include the Offer Declined or Candidate Withdrew disposition reason inclusion of Poor Manager Rapport and Mismatching Department Culture. | | | | |
| 24498516 | Recruiting | Enable Notes on Job Requisitions within Recruiting | Y | 2 |
| 25101123 | Recruiting | Enable Notes on Job Applications within Recruiting | Y | 2 |
| 25101161 | Recruiting | Enable Notes on Candidates within Recruiting | N | - |
| 24935789 | Staffing | Route Request Default Compensation and Change Organization Assignments Steps in Create Position BP | Choice | 2 |
| 24935824 | Staffing | Route Propose Compensation Hire step in Hire Business Process to HR Partner or HR Contact | Choice | 2 |
| 25037905 | Staffing | Prevent Managers from Initiating Direct Hires | Y | 2 |
| 25038063 | Staffing | Warning When a Foreign National Changes Their Address Outside of Onboarding | Y | 2 |
| 25038578 | Staffing | Route Request Default Compensation and Change Organization Assignments Steps in Edit Position Restrictions BP | Choice | 2 |

Priority List – Discussion

- **25071445**
 - How will this work—they get some hours assigned for mental health just for veterans?

- These are special time offs granted by the state; policies do not specify exact hours (section 12 and 13 of policy).
 - Policy specifies what time can be used for:
<https://policies.tamus.edu/31-03-03.pdf>
 - Will this be connected to extended sick leave?
 - In Workday, there is no connection.
 - Will the balance be zeroed out at the end of fiscal year?
 - This vote is for these two time-off plans to zero out at the end of the fiscal year so that they do not carry over to the next fiscal year in case there are some left over.
- **25075865**
 - Will the report honor HR Contact assignment constraints?
 - Yes
 - Would HR Contact have access to the entire organization?
 - No, will only have access to employees supported by their HR Contact role assignment.
- **25075913**
 - If taking on additional jobs, are they taking on additional classifications?
 - For this particular change, they will still need to be a Faculty on the additional job to use this option.
 - Will this still route to Faculty Partner to Approve?
 - Based on the approval process on compensation change, if currently routes to Faculty Partner, then yes.
 - If 75% for 5 months then 25% during the summer but not actually working so is zero, how will this affect benefits?
 - If in a position for 75% for nine months as their primary job, will not be impacted.
 - Will only be impacted if less than 75% and the other job tipped them over that 75% threshold.
 - Benefits looks at positions: 9-month at 40% and 2-month at 20%, will add them up to 60%.
 - 3-month appointments do not add toward benefits eligibility
 - Only counted if 4.5 months or more and act like they are overlapping.
 - How does this affect turnover numbers?
 - End Job is not a termination.
- **25072095**
 - What prompted this?
 - Working group discussion to enhance processes and streamline.
 - This helps TDEM know who sat in the interview; if this step is removed, will who sat in on the interview no longer be captured.
 - Correct.
- **25072975**

Discussion of disposition reasons:

 - Candidate Withdrew:
 - Poor Manager Rapport
 - Mismatching Departmental Culture

- Offer Declined:
 - Poor Manager Rapport
 - Mismatching Departmental Culture
- Candidate withdraws application and indicates why they withdrew. A Candidate does not make selection themselves; they can only withdraw application.
- When Manager or Recruiting Partner dispositions the candidate with Application Withdrawn selection, they will have the option to include reason why applicant withdrew.
- OGC indicates there is no legal objection, but no value should possibly be tracked outside of Workday.
- This would be helpful in situations where recruiters are reaching out to candidates to get more information on why they withdrew.
- Employer would be on the hook for rendering if they select the reason that a candidate withdrew. This may create a liability if nothing exists to verify a specific selection for why a candidate withdrew.
- **Decision:** proceed with vote on this enhancement, but this enhancement will not include the Offer Declined or Candidate Withdrew disposition reason inclusion of Poor Manager Rapport and Mismatching Department Culture.
- **24498516**
 - Who can delete notes?
 - Only the person who created it.
 - Only Recruiting Partner would have permission to create notes.
- **25101161**
 - How does this relate to public information requests?
 - Everything is included with public records requests—assuming this, then notes would be included.
 - Considering the risks for candidate notes being entered, what was the impetus for this? What is the objective?
 - Working Group voted to bring this item before HAC for a vote.
- **24935789**
 - Is it possible to dig down a little bit further to manage a role based on employee type?
 - This can be evaluated in working group; please coordinate with representative to add to agenda.
- **25037905**
 - If someone has both manager and HR Contact, would they be prevented from initiating a direct hire?
 - No, an employee with Manager and any other role that has initiating permission will still be able to initiate.
- **25038063**
 - Is there a prompt that gives HR notification that someone is changing their address to outside of the US?
 - If needs to be discussed in working group, will add to agenda to discuss.

- There are reports that show mismatch of work location and address. Also have if the state is changed to non-TX, the payroll partners are notified.

4. Discussion Items

- Update regarding securing payment elections:
 - Overall, the approach taken by Security Operations Center and System IT secure accounts at a higher level rather than manual intervention. Evaluating incorporating additional verification to change payment elections outside of onboarding. No update as to when this may come forward but will communicate as information avails.
 - Will Payroll Partner be able to make changes?
 - Additional verification is targeting self-service.
- When running reports and prompts ask for different worker types, there is not the opportunity to exclude NEBO sup orgs—would be good to include prompt to exclude NEBO sup orgs.
 - Let us know those reports.
- Any enhancement to allow scheduling a report to be sent to worker without the necessary roles to run the report themselves?
 - Will discuss offline.

5. Next Steps

- 90 Day Roadmap Refresh
 - Available on Workday Help Site – Governance: will be updated and refreshed by April 30th and include access to meeting minutes.
 - Minutes will also available via OneDrive
- Next Workday HCM Advisory Council Meeting – July 16, 2024