Time / Workforce Management

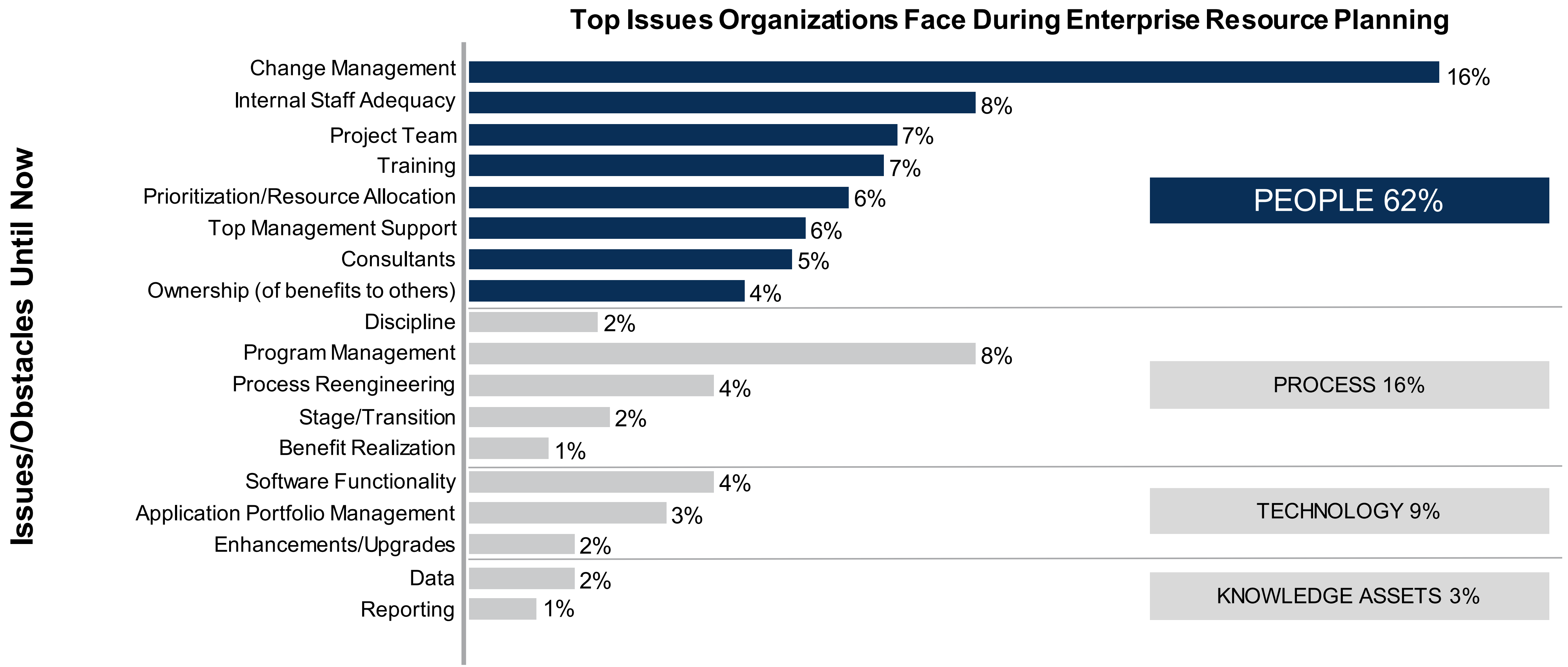
Agenda

- Introductions/Roles
- Change Starts Now
- Ground Rules
- User Stories
- Expected Outcomes
- Process Maps Review
- SWOT
- Recap

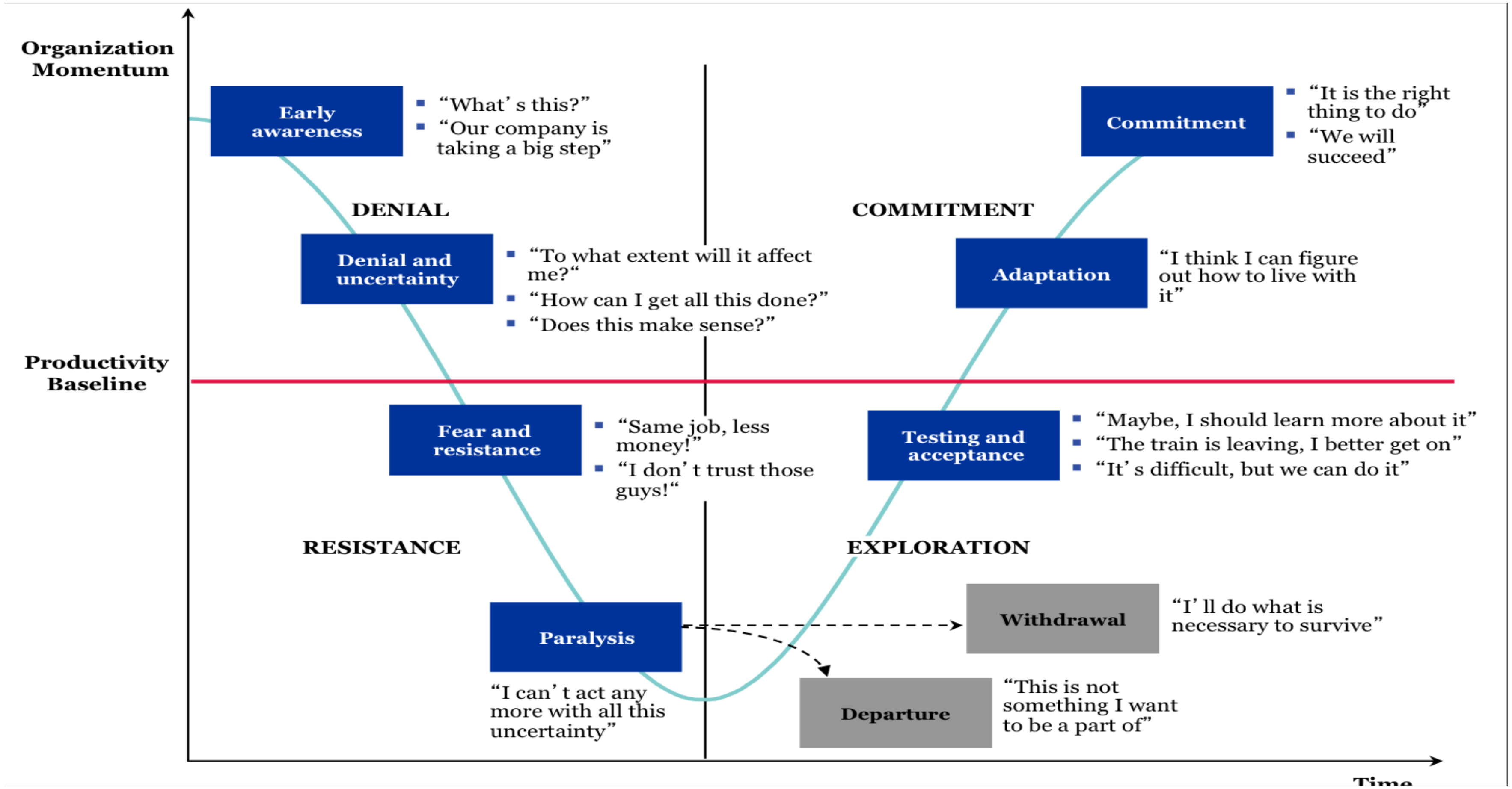
Workshop Roles

Role	Description
Primary Facilitator (State)	Walk through process and facilitate discussions
Primary Facilitator (Deloitte)	Methodology, facilitate discussions
Scribe/Timekeeper	Documents all updates to be made to the process maps, take notes, and record attendance
Process Owner	Owns the business process and will confirm final decisions
Subject Matter Expert (SME)	Provides feedback and insight into the business process(es)
Change Management (OCM)	Document change impacts and training requirements
Security	Capturing security and separation of duty requirements
Technical	Capturing FRICE-W and any other technical requirements

Change Starts Now



Change Curve



While some changes may seem straightforward, change can be uncomfortable, and people naturally embrace a path of least resistance.

Ground Rules

- Give your undivided attention and time
- Think and speak openly, candidly, and constructively
- Ask questions and provide feedback on design team recommendations. There are no “silly’ questions!
- Minimize side conversations
- Allow one speaker at a time
- Leverage the diverse agency representation to collaborate and identify an integrated approach to the future state design
- Scribe will keep us on track and conduct periodic time checks to allow for break periods and lunch

User Stories

User-centered approach

User stories are written from the point-of-view of the end user, they encourage us to embrace a user-centered approach

Moments That Matter

User stories link personas and moments that matter and delivers a better user experience and desired business values

Stakeholder Alignment

Aligns stakeholders on the future state solution requirements and drives development of the right solution

Sprints

The quality of the user stories directly impacts the effectiveness and value of sprints

Expected Outcomes

Business Process Redesign Sessions

Security

- Security Roles
- Role to Position Mapping

Technical

- Forms / Workflows
- Reports
- Interfaces
- Conversions
- Enhancements

OCM

- Communications
- Training
- Workforce Transition

Process

- Moments that Matter
- Personas
- User Stories

HR-110 Workforce Management

HR-110	Workforce Management	Workforce Management (WFM) refers to how the State of Idaho manages their employees, specifically the tracking of their time, absences and integration of those processes with Payroll.
HR-110-050	Time Capture and Approval	Employee enters worked time and attests to their timesheet. Time is approved by the employee's supervisor or Agency HR. Time can be captured at the start or end of a shift, break, or lunch break; and is done via electronic timekeeping or direct entry. This data is later transferred into the payroll system to calculate payroll.
HR-110-060	Time Off Request	Employee requests time off (paid leave, protected leave, etc.) through self-service in the system and their Manager approves or denies requests according to business needs.
HR-110-010	Basic Scheduling	Agency Scheduler creates and validates if a new shift or schedule is needed. The Manager assigns the applicable schedule to employees. This process should be completed every time a need for a schedule is identified and prior to allocating a work schedule to an employee.
HR-110-020	MVS Scheduling with Agency	A consolidated scheduling process that enables schedulers to generate baseline scheduling requirements, plan and create schedule templates based on workload, generate actual schedules, view and edit the generated schedules, and assign employees to the schedules.
HR-110-080	Time Corrections	HR Agencies/Managers continuously monitors their Employees' timesheets and takes action on any alerts and exceptions in the WFM system. This ensures that all time data is accurate and free from system errors, and that any exceptions have been approved. After time data has been reviewed and approved, it is sent to payroll processing.
HR-110-090	On-Cycle Payroll Process	Manager reviews, validates, and approves timesheets during the regular pay period. If edits are needed to timesheets, the Agency Payroll will remove approval and make necessary changes before re-approving. The processed data is then sent to the payroll system.

HR-110 Workforce Management

HR-110-100	Process Historical Corrections	Agency Payroll makes edits to timesheets that have already been processed after being initiated by Employee's Manager, Employee, or Agency Payroll. This data is then sent to payroll and paid to the Employee as an on-cycle or off-cycle paycheck as per internal State of Idaho business processes.
HR-110-030	Setup Holiday Calendar	The State of Idaho decides which holidays should be observed statewide. This process typically takes place annually.
HR-110-070	Donate / Receive Time	The requestor initiates the process to receive vacation or sick time (loaded in the requestors sick balance only) via employee donation which requires approval/review at the Agency level for both the requestor and donor representative agencies.
HR-110-110	Prior Comp Time Payout: Covered: Auto	The Payroll Departments processes the semi-annual comp payout (previous 6 months balance) process for covered employees with results sent to HR Agency and Agency Budget and processed in payroll.
HR-110-120	Comp Time Payout: Covered: Ad Hoc	Employees or Agencies can initiate a one-time request for comp time pay out with approvals by Agency Budget and Agency Approving Authority. The comp time will be submitted in WFM and processed in payroll.
HR-110-040	Manage Luma WFM System Access	Time Administrator makes changes to system access which could include increasing access to WFM system or decreasing access to WFM system after receiving and confirming a request.

Business Process Map Legend

Start	**Event (e.g., Start, End)**		**Subprocess**
Employee	**Swimlane**		**Process Interface/Link**
	Task/Activity	AND Rule AND	**AND Rule**
→	**Task Connector**	OR Rule OR	**OR Rule**
Document	**Document**	XOR Rule XOR	**XOR Rule – Exclusive OR**
MTM	**Moment That Matters**	infor	**Infor system-enabled task / step**

HR-110 Workforce Management

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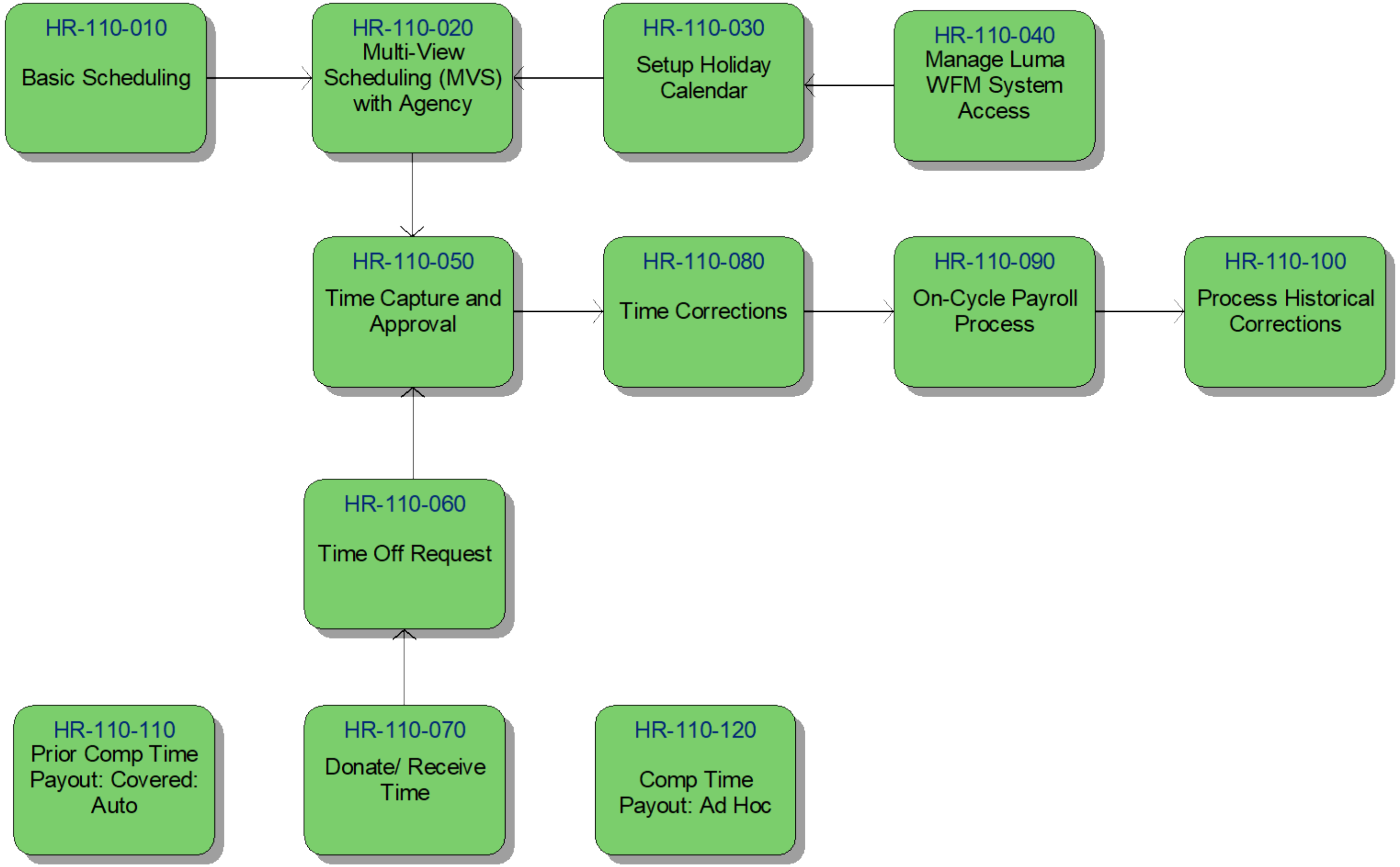
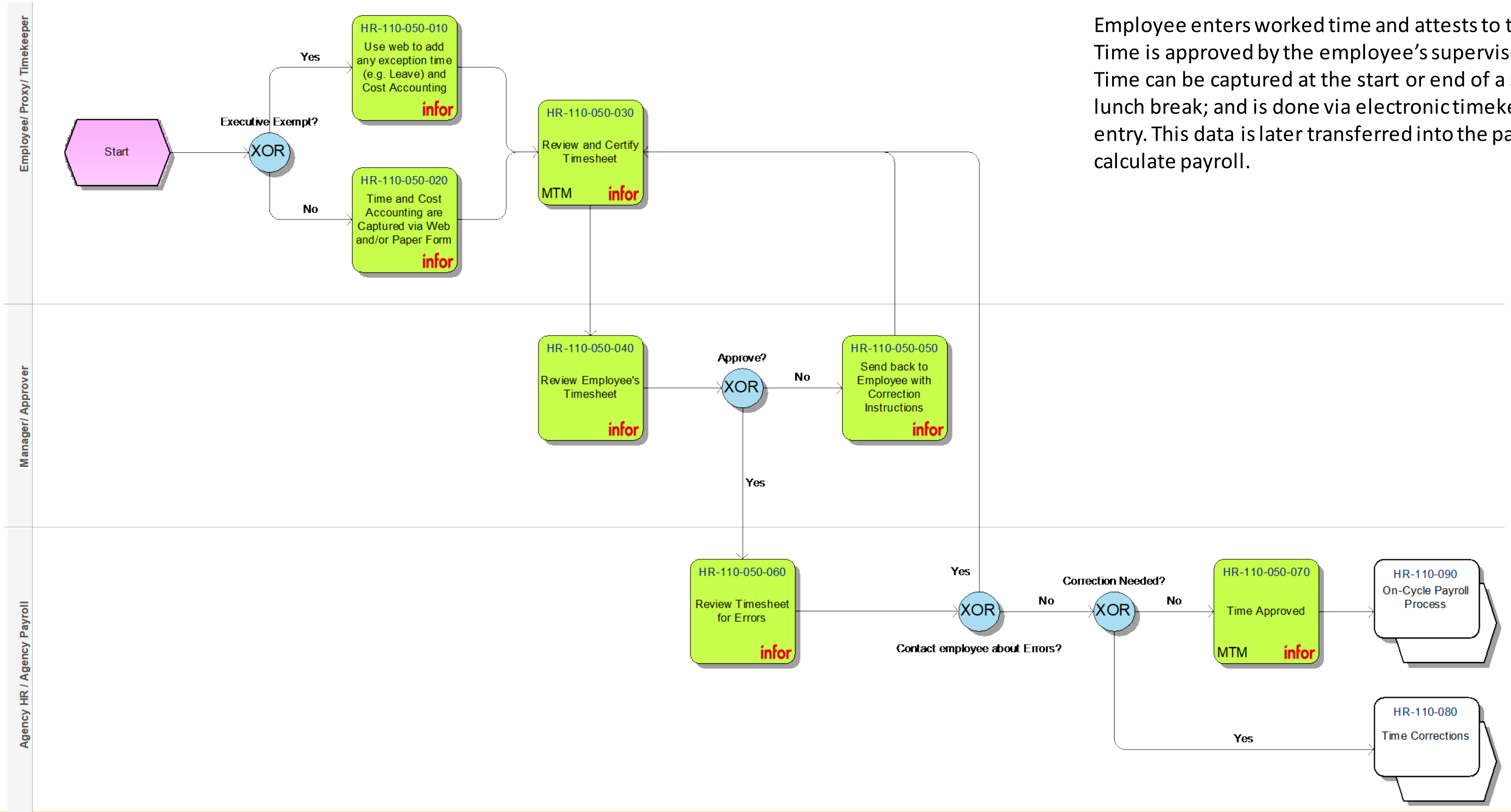


HR-110-050 Time Capture and Approval



Employee enters worked time and attests to their timesheets. Time is approved by the employee's supervisor or Agency HR. Time can be captured at the start or end of a shift, break, or lunch break; and is done via electronic timekeeping or direct entry. This data is later transferred into the payroll system to calculate payroll.

HR-110-060 Time Off Request (TOR)

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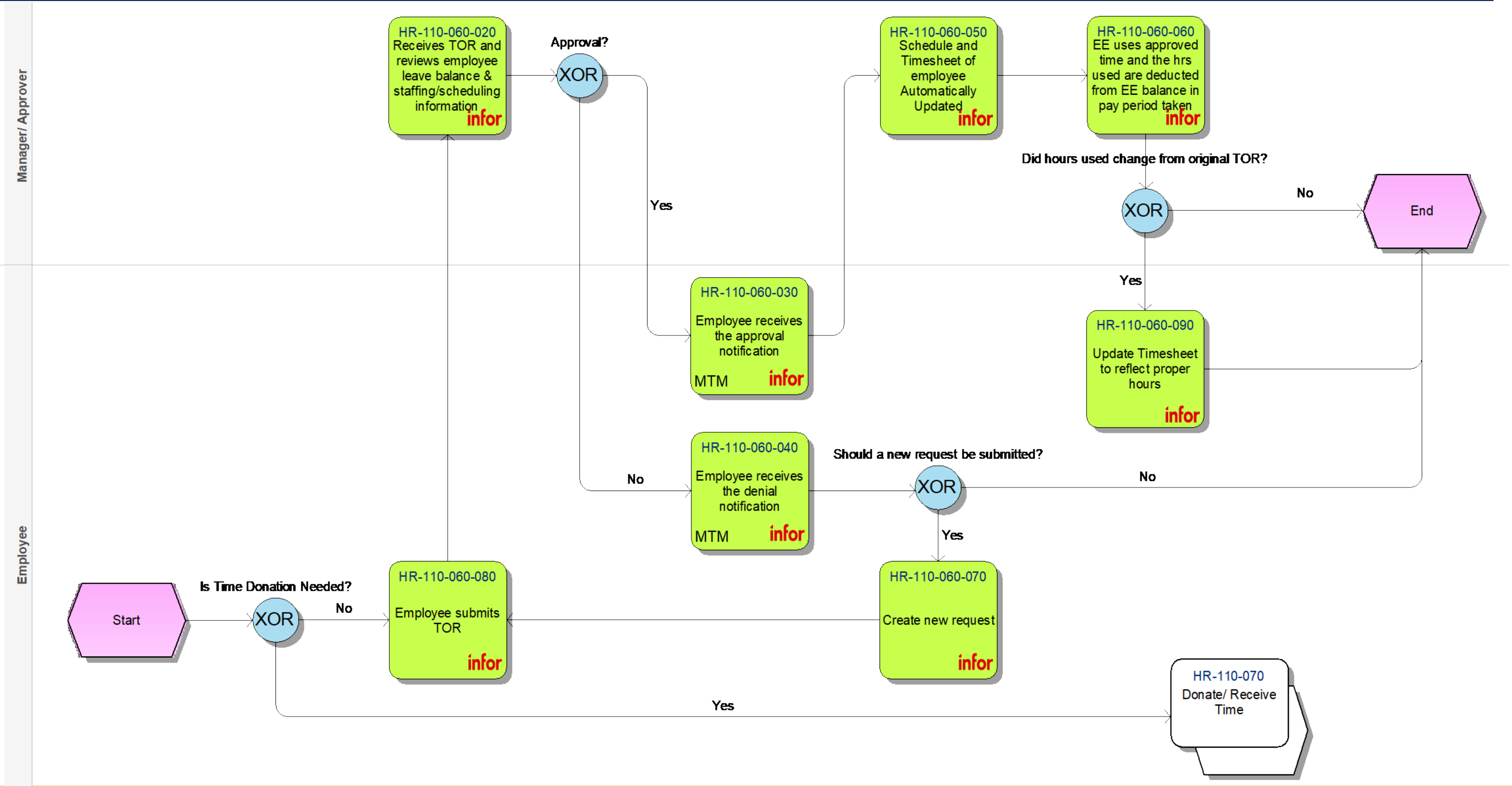

HR-110-010 Basic Scheduling

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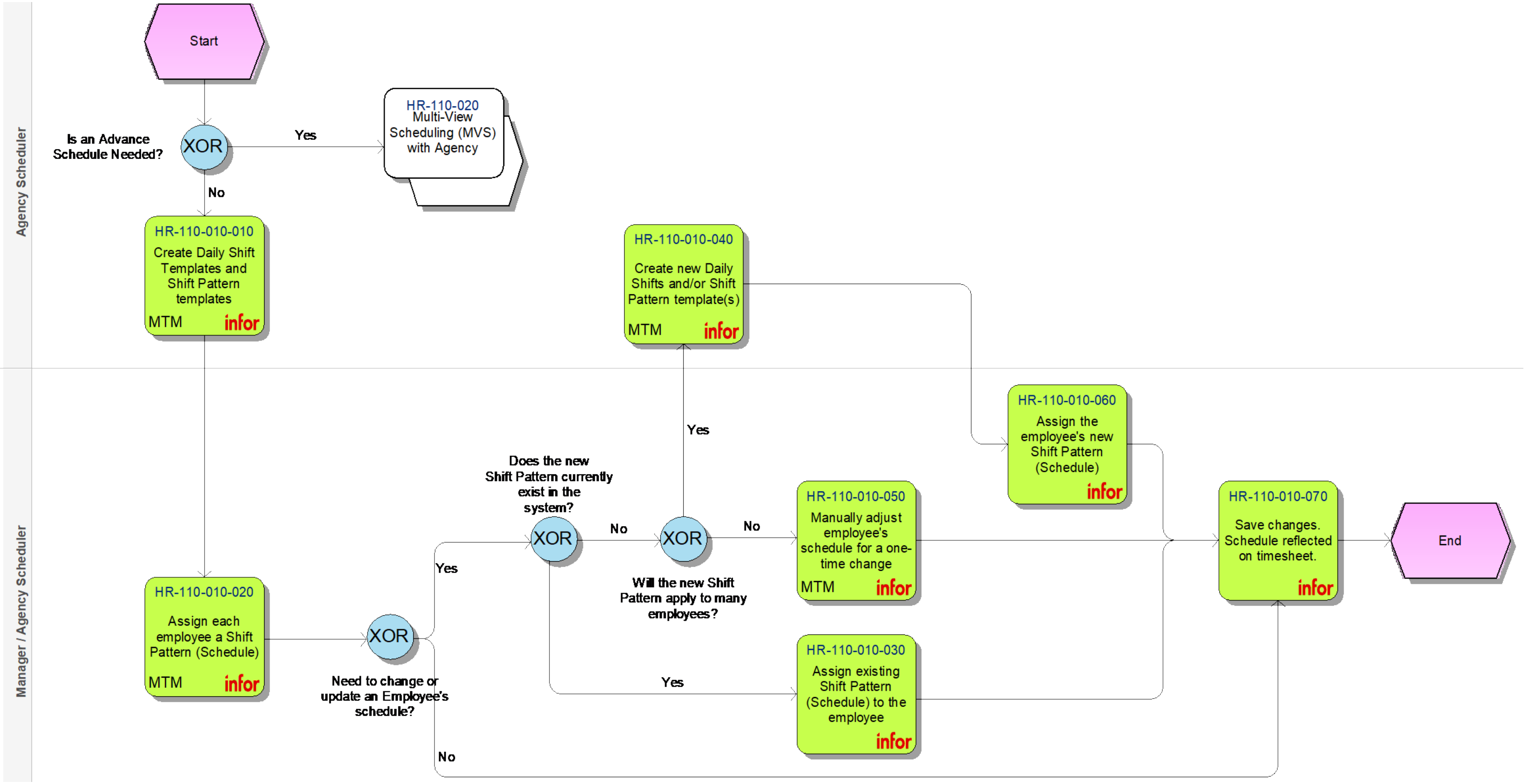
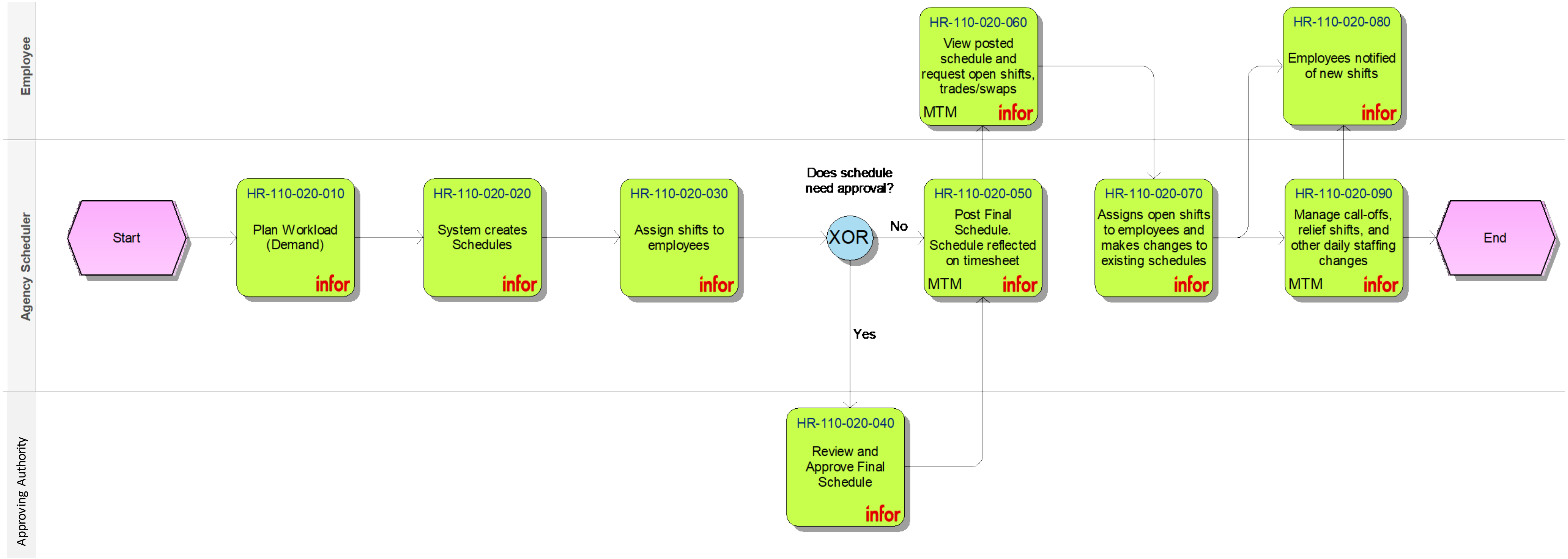


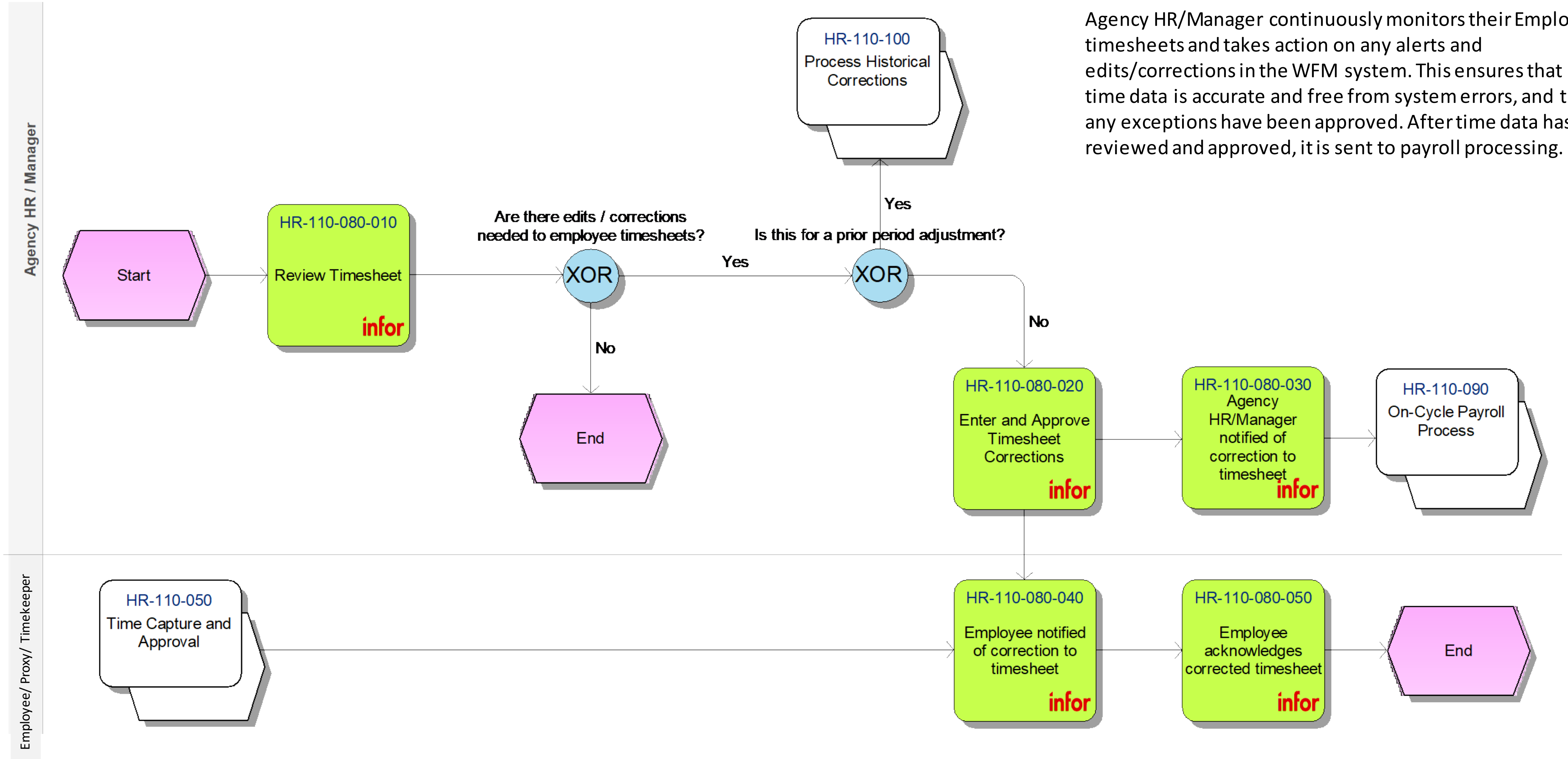
HR-110-020 MVS Scheduling with Agency

A consolidated scheduling process that enables schedulers to generate baseline scheduling requirements, plan and create schedule templates based on workload, generate actual schedules, view and edit the generated schedules, and assign employees to the schedules.



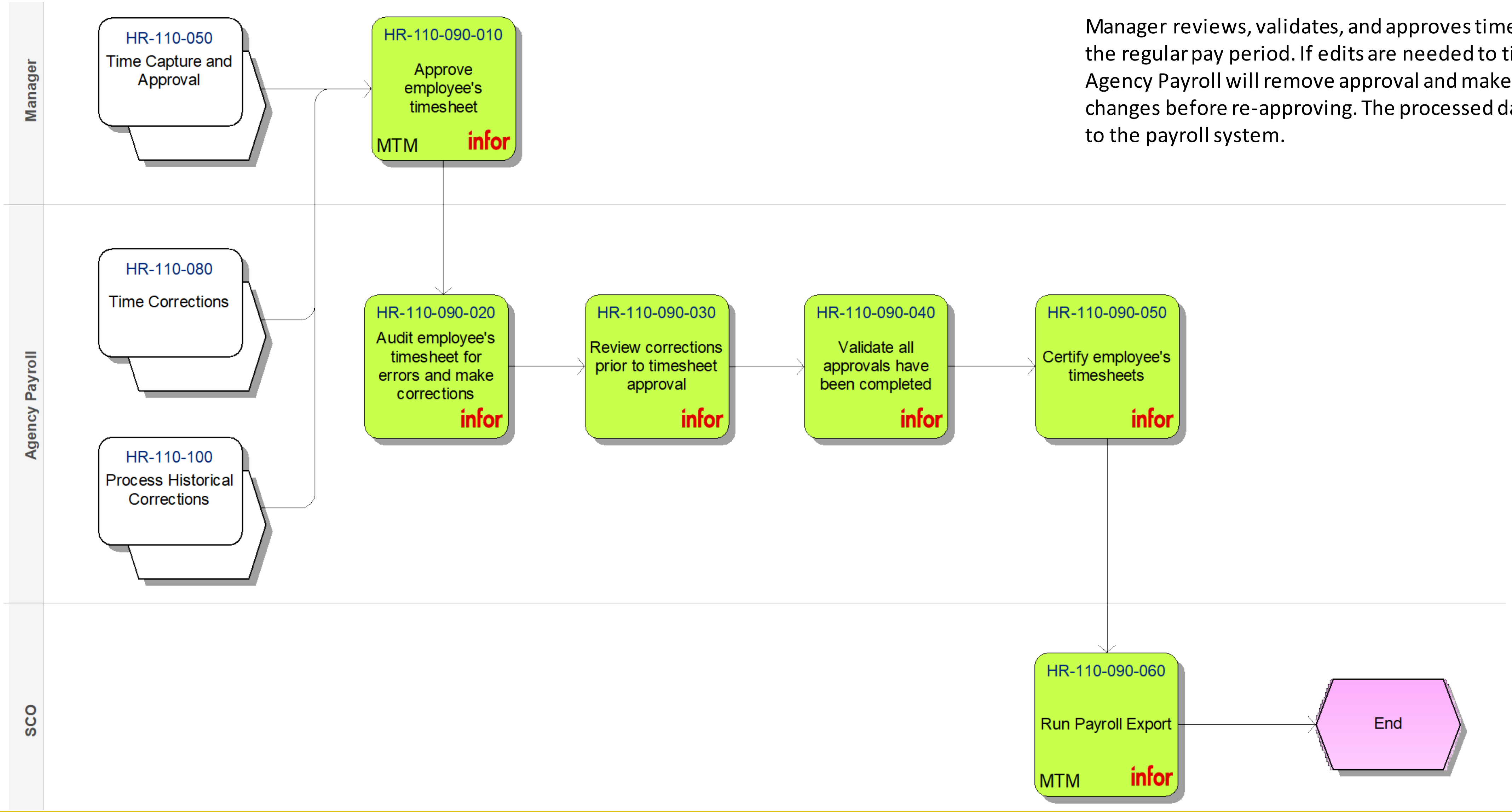
HR-110-080 Timesheet Corrections

Agency HR/Manager continuously monitors their Employees' timesheets and takes action on any alerts and edits/corrections in the WFM system. This ensures that all time data is accurate and free from system errors, and that any exceptions have been approved. After time data has been reviewed and approved, it is sent to payroll processing.



HR-110-090 On-Cycle Payroll Process

Manager reviews, validates, and approves timesheet during the regular pay period. If edits are needed to timesheets, the Agency Payroll will remove approval and make necessary changes before re-approving. The processed data is then sent to the payroll system.



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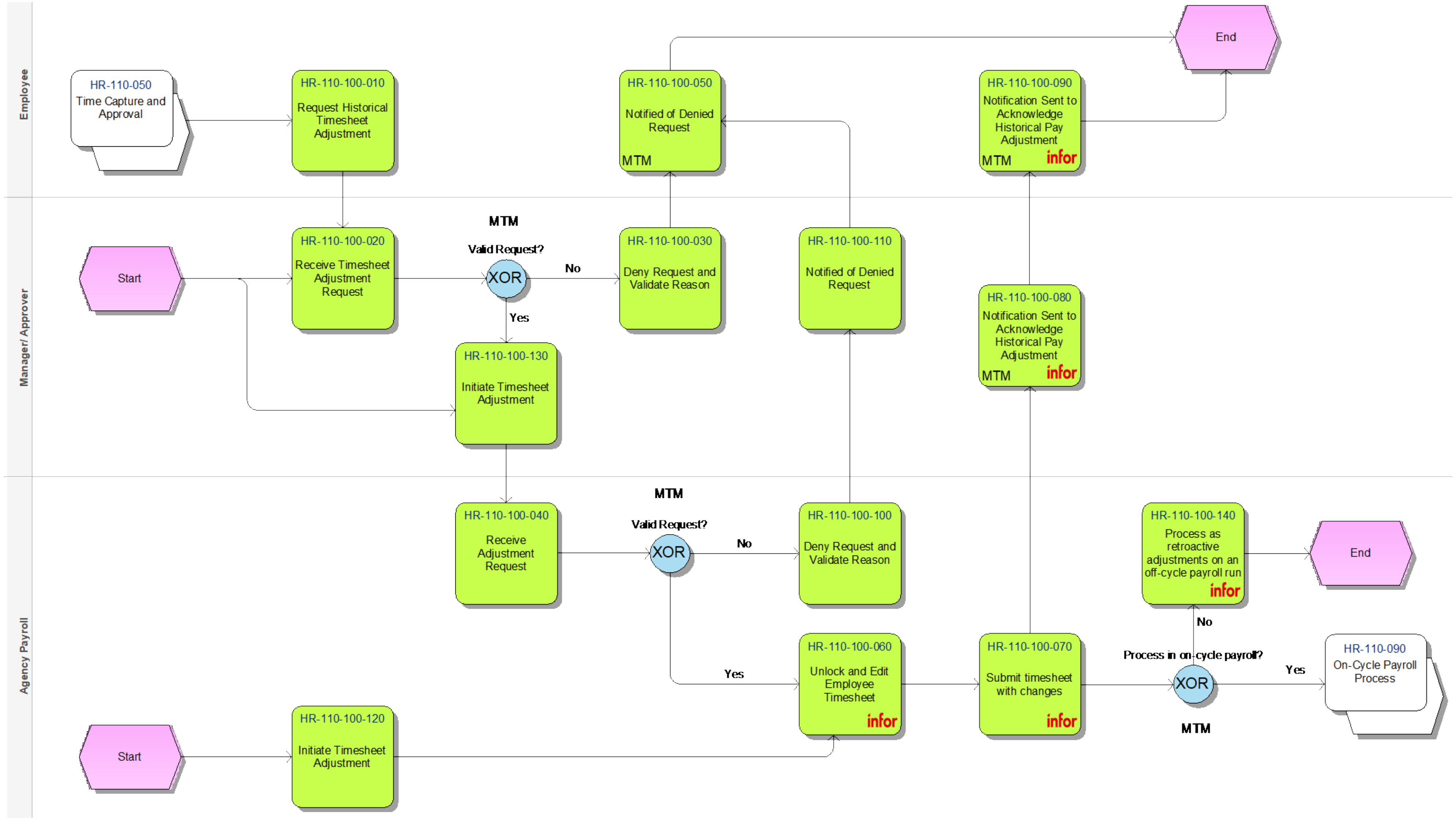
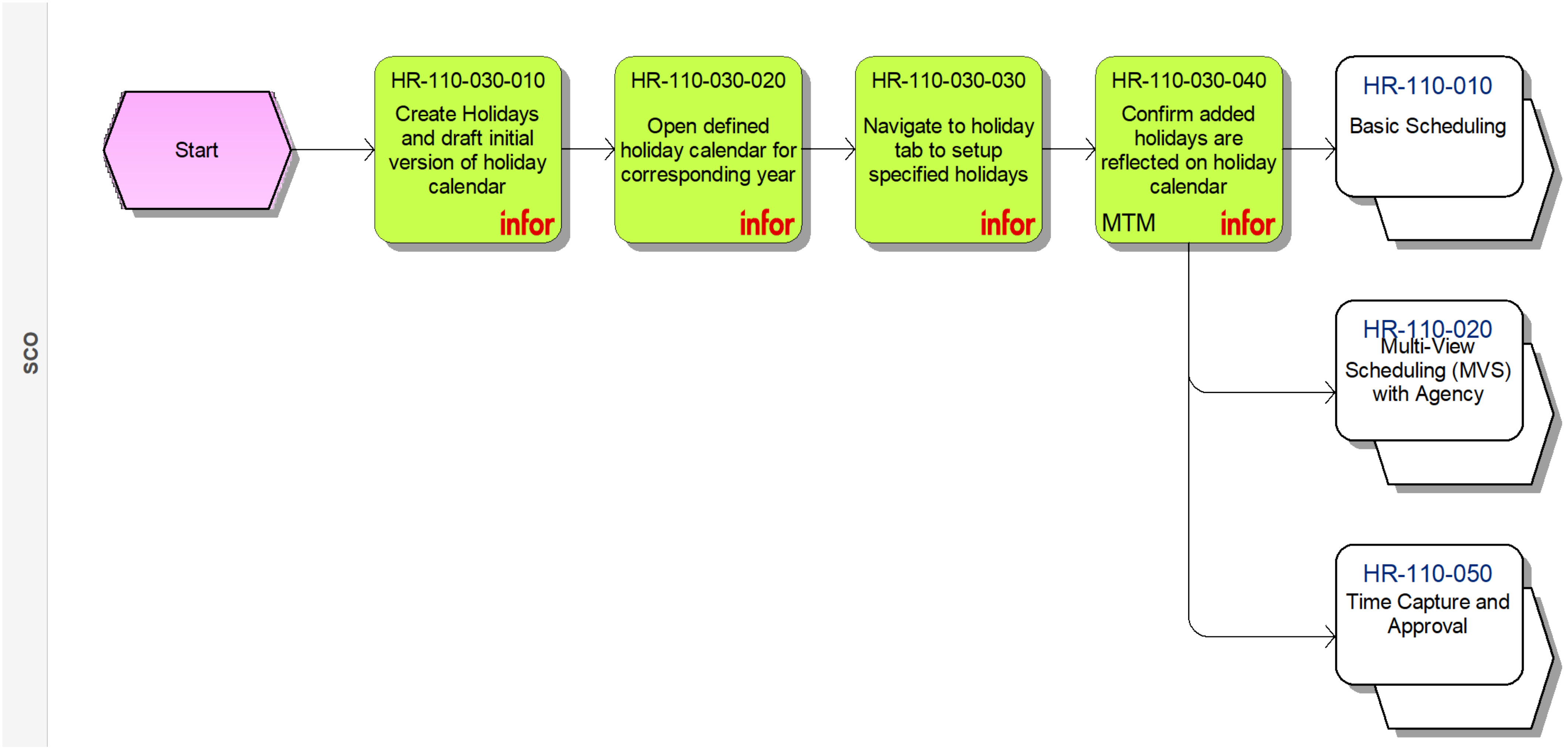
Agency Payroll makes edits to timesheets that have already been processed after being initiated by Employee's Manager, Employee, or Agency Payroll. This data is then sent to payroll and paid to the Employee as an on-cycle or off-cycle paycheck as per internal State of Idaho business processes.



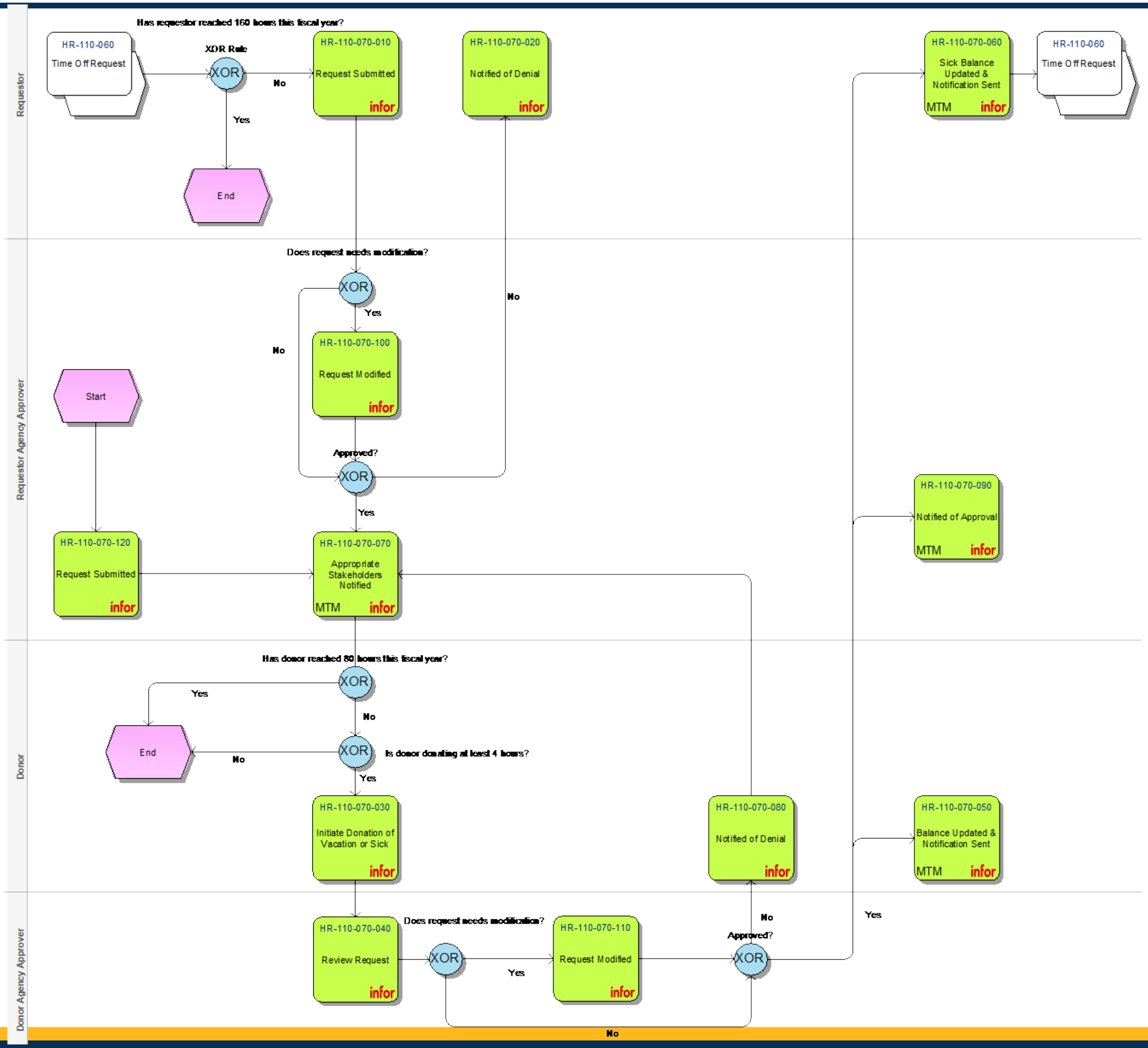
HR-110-030 Setup Holiday Calendar

The State of Idaho decides which holidays should be observed statewide. This process typically takes place annually.



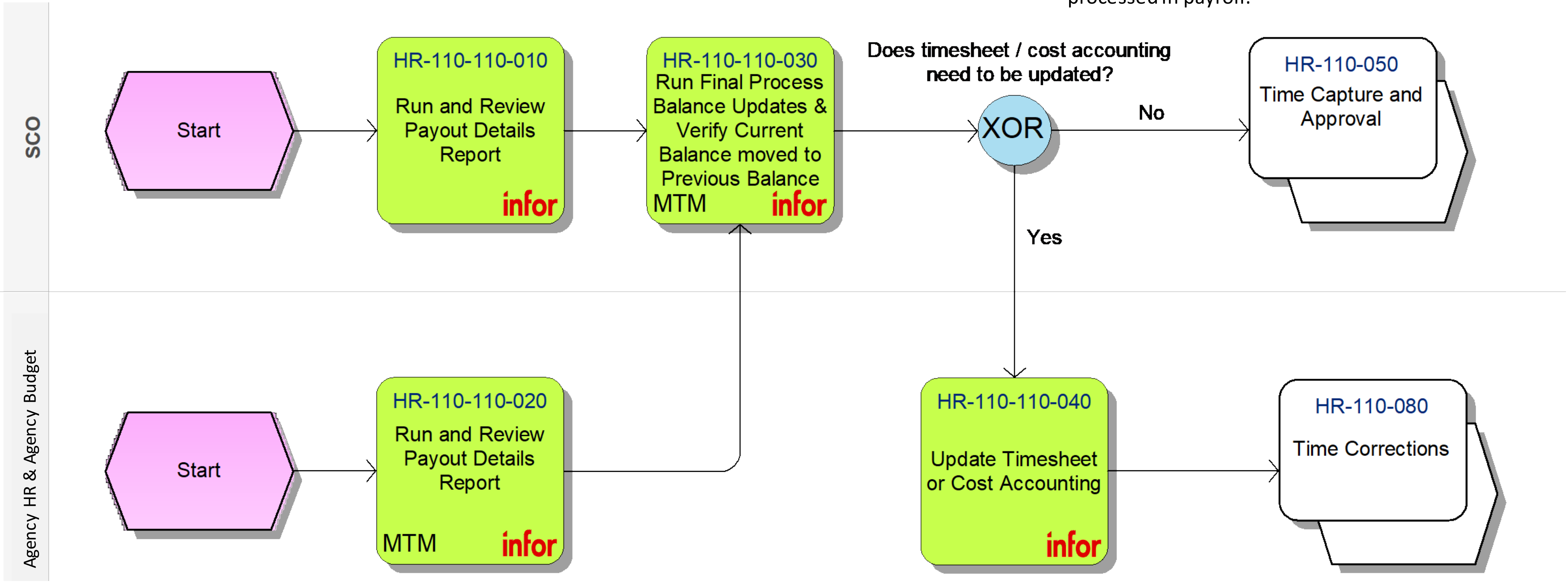
HR-110-070 Donate / Receive Time

The Requestor/Requestor Agency Approver initiates the process to receive vacation or sick time (loaded in the requestors sick balance only) via employee donation which requires approval/review at the Agency level for both the requestor and donor representative agencies.



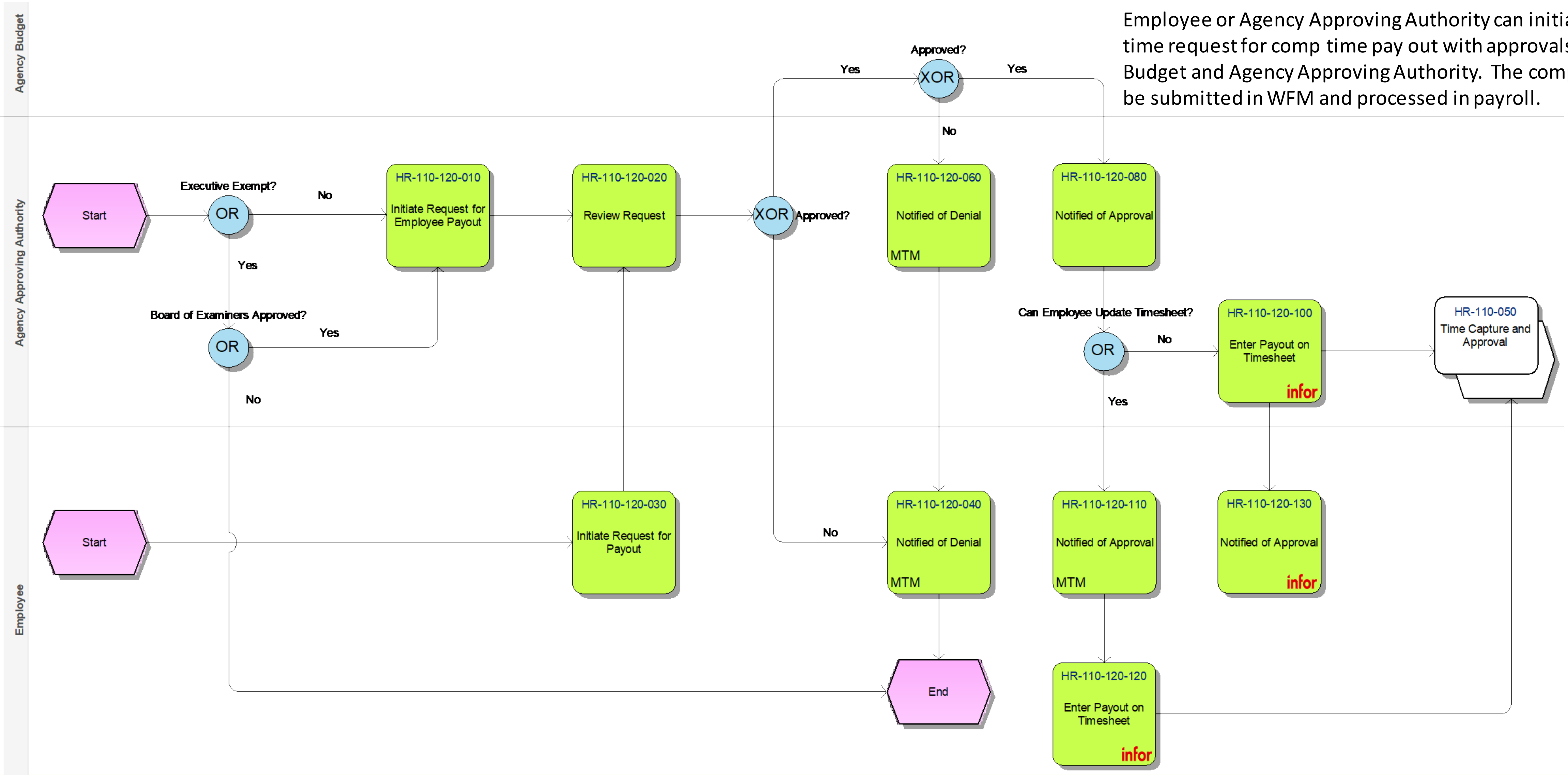
HR-110-110 Prior Comp Time Payout: Covered: Auto

The State Controller's Office (SCO) processes the semi-annual comp payout (prior 6-month balance) for covered employees with results sent to Agency HR and Agency Budget and processed in payroll.



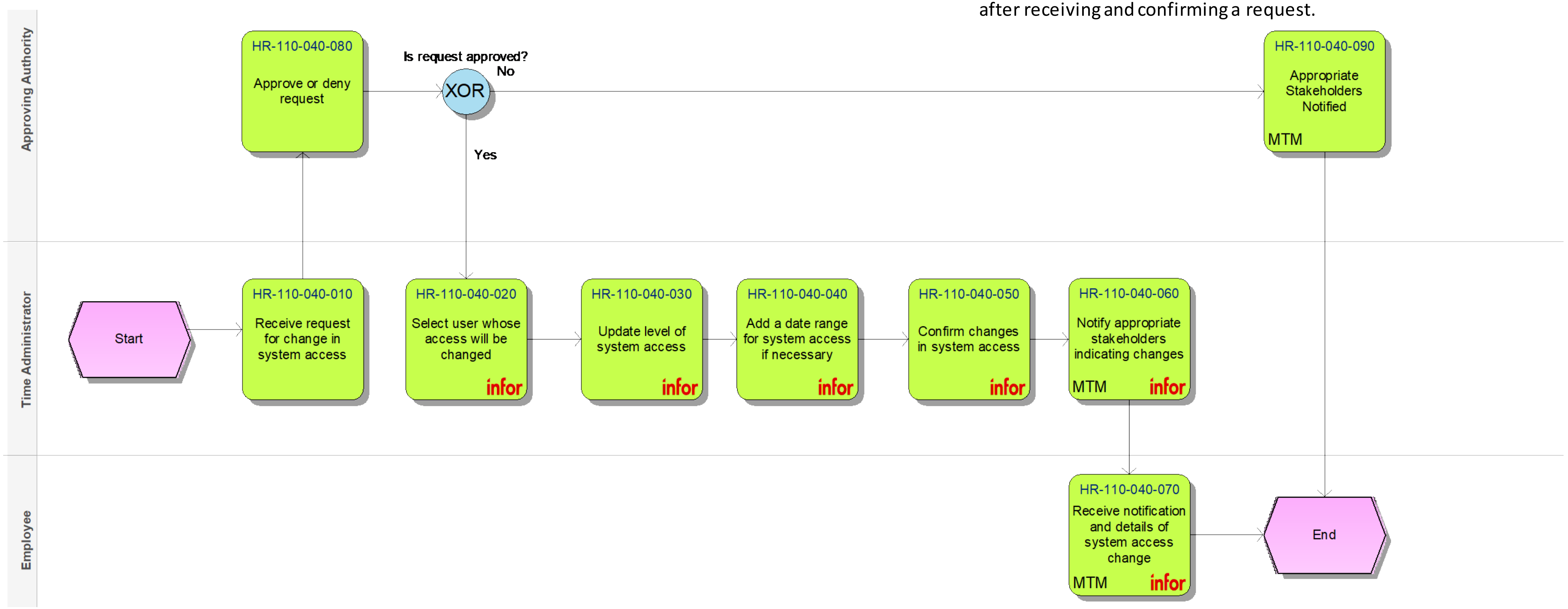
HR-110-120 Comp Time Payout: Ad Hoc

Employee or Agency Approving Authority can initiate a one-time request for comp time pay out with approvals by Agency Budget and Agency Approving Authority. The comp time will be submitted in WFM and processed in payroll.



HR-110-040 Manage Luma WFM System Access

Time Administrator makes changes to system access, which could include increasing or decreasing access to WFM system, after receiving and confirming a request.



Parking Lot Responses

HR 110 020 - MVS Scheduling with Agency

01

Will Employees Get Notified of Open Shifts
Employees can see shifts that are available for them to claim on the employee schedule page in Mobility. On each day that has at least one shift available, the number of available billboard shifts is displayed on the date cell. Employees will know that the shift was assigned to someone because it will no longer be visible in Shift Billboard.

Additionally, there is a Mobile Shift Offer feature that allows open shifts to be broadcast to employees by text message, phone call, or email. The broadcast can be sent from the Advanced Scheduling View, the Staffing Center, or the Relief Queue. Employees are sent a message when a shift is offered, and they can respond to the message to claim the shift.

02

How Will Employees Be Notified of a Change in Shift
An alert will notify employees that their schedule has been changed. The alert will be a sent to the employee via Infor Workmail.

03

Please Explain the Call-In Functionality
Call Lists are used in the Relief Calling Area to determine the list of employees that are displayed. Call Lists can be generated for teams to which users have access:

- Users can create Call Lists for a Team or for a List of Employees
- When creating a Call List for a Team, the Call List applies to the entire Team
- When creating a Call List for a list of Employees you can specify the Job and Shift Type. This indicates that only employees in the specified job or who work the specified shifts will display in the Call List
- There is a filter in Relief Management which can be used to exclude/include employees who are currently working
- You can also view employees who are Scheduled/Not Scheduled/Partially Scheduled for the day
- You can keep track of the employees who are called using the Call Log feature

Parking Lot Responses

HR 110 100- Process Historical Corrections

01

When an employee has current time and prior period adjustments on the on-cycle payroll, will it reflect on the same pay stub or separate?
If an employee has adjustments to time in WFM for a prior period and time for the current period, when sent on the on-cycle payroll export the time from the prior period can be on one payment unless specified.

HR-110-070 Donate and Receive Time

02

Can a dashboard be created when there are pending requests for time donation vs the use of notifications being blasted to all employees?
While there are core options to notify employees of a colleague requesting time to be donated, we can explore creating a dashboard or Birst functionality.

SWOT - HR-110-050 Time Capture and Approval

Process	S / W / O / T	Description
HR-110-050 Time Capture and Approval	Strength	• Accessibility to the system is easy • Everyone gets paid • Allows for hourly, daily, and annual rates • Lump sump payments can be added to regular time during payroll • Allows multiple approvers for time sheets but it's a limited and cumbersome function • Edits in place to aid in time entry (holiday coded for an entire week, time coded before/after hire/term dates etc.)
	Weakness	• Not enough edits in place to aid in time entry • Many hours spent estimating employee time and verifying changes • Many hours spent verifying that hours reported match the hours entered in I-Time • Unable to accurately verify a person's time • Unable to track training hours-need to keep training and patient care separate • PCA codes-unable to track errors • Unable to calculate OT (Covid codes) • Time and scheduling are not linked together • No time sheet generated for auto-generated time • Only CPO can retrieve time sheet for corrections after approved by supervisor

SWOT - HR-110-050 Time Capture and Approval (continued)

Process	S / W / O / T	Description
HR-110-050 Time Capture and Approval	**Weakness**	• Only CPO can retrieve time sheet for corrections after approved by supervisor • Problems when approver changes after time sheet has been created • One time sheet per employee can be viewed at a time • If a multiple agency employee, two logons are required to enter time and view time sheets • If employee transfers from one agency to another, they lose the ability to view their historical time sheets at the old agency • If time sheet is exited incorrectly or times out, the time sheet is locked and can only be manually unlocked by SCO during the day (or all locked documents automatically unlock overnight) • Multiple jobs require a separate time sheet for each job, even at the same agency (PCN driven) • Shift differential is coded by week, not by shift or day. • Employee SSNs are being used for ID within Itime
	Opportunity	• Statewide access to information

SWOT - HR-110-060 Time Off Request

<table>
<tr><th>Process</th><th>S / W / O / T</th><th>Description</th></tr>
<tr><td rowspan="3">HR-110-060 Time Off Request</td><td>Strength</td><td>• Leave/Overtime request available in I-Time with a leave auto-fill to time sheet option available
• Requests can be approved by more than one person based on org structure maintained by the agency</td></tr>
<tr><td>Weakness</td><td>• Most agencies don't use it (see agency metrics)
• Reconciliation problems/confusion between time sheet and requests
• Overtime request does not reconcile to time sheet
• Additional steps needed when making time sheet corrections</td></tr>
<tr><td>Opportunity</td><td>• Offer a statewide time off request option that auto-fills/reconciles time sheet</td></tr>
</table>

SWOT - HR-110-010 Basic Scheduling

Process	S / W / O / T	Description
HR-110-010 Basic Scheduling	**Strength**	• Can complete an entire year's base schedule in a matter of minutes, if staff is working set schedules
	Weakness	• State of Idaho does not currently have a statewide scheduling application - agencies use separate software if needed
	Opportunity	• Offer a statewide scheduling application that interfaces with time sheets

SWOT - HR-110-020 MVS Scheduling with Agency

Process	S / W / O / T	Description
HR-110-020 MVS Scheduling with Agency	Strength	• Can let the scheduler know where the needs and extra staff are • Can see who is not scheduled and send messages only to staff that are available to assist • Easy to use and allows you to copy and paste entire weeks at a time
	Weakness	• Unable to notify staff of open positions • Unable to track call-ins from schedule to timesheet and vice versa • State of Idaho does not currently have a statewide scheduling application - agencies use separate software if needed
	Opportunity	Offer a statewide scheduling application that interfaces with time sheets

SWOT - HR-110-080 Time Corrections/HR-110 Process Historical Corrections

Process	S / W / O / T	Description
HR-110-080 Time Corrections and HR-110 Process Historical Corrections	**Strength**	• Historical-Since they can include manual updates right on the mainframe, anything is possible • Historical-Fairly easy for agencies because SCO manually enters corrections • Historical-Some time codes allow to enter retro pay on the current time sheet • Current-Retrieved and resubmitted time sheets overlay the same batch
	Weakness	• Historical-Agencies are often unable to see what SCO has done to make the correction • Historical-SCO writes paper checks manually and fronts the money between payrolls • Historical-Requires manual calculation of overtime, leave available • Historical-Difficult for vendors to reconcile payments when void/manual processes • Historical-Often requires collecting $ from employee. Correction can not process until $ is received at SCO from employee • Difficult to audit employee changes (i.e., if you pull up the time sheet, nothing shows a correction was made)
	Opportunity	• Agency control / automation • Current and Historical corrections appear on employee time sheets

SWOT - HR-110-090 On-Cycle Payroll Process

Process	S / W / O / T	Description
HR-110-090 On-Cycle Payroll Process	**Strength**	• Cyclical and mostly predictable • Payroll processing dates can be easily changed/moved within 24 hours • Real time report of agencies who have submitted time • Allows more than adequate time for direct deposit files • Various actions used to pay employees (I-Time, IPOPS, MVAs, auto generated) • Pay Stubs available to employees a week before pay day • Actions automatically routed for approvals • Robust error messages on preprocessing reports (leave hours over 40 etc.)
	Weakness	• Payroll run/Pay date gap shorter allows for more accurate employee data • Transparent historical data in one location • Errors could be caught at the time sheet level

SWOT - HR-110-030 Setup Holiday Calendar

Process	S / W / O / T	Description
HR-110-030 Setup Holiday Calendar	**Strength**	• Set up in the 907 directory straight on the mainframe. No approval process. (Pay period number and holiday date) • Feeds to time sheets • Quick updates when needed
	Weakness	• Easy to make an error • Number of holidays in a pay period is also added manually to the CAL directory • Only viewable by SCO • Entering the same information in more than one place
	Opportunity	• Transparency / View access

SWOT - HR-110-070 Donate / Receive Time

Process	S / W / O / T	Description
HR-110-070 Donate / Receive Time	Strength	• Form available in IPOPS (web application) • Edits in place to check for eligibility to donate/receive based on current balances • Employee can donate to another employee without being able to see who they are donating to
	Weakness	• Time donations are keyed directly into a batch on the mainframe - large margin for error • Two manual entries/batches required: one for donating employee, one for receiving employee • Employees don't know if donation happened until AFTER payroll runs - which means employees could lose vacation because they're at max or could be underpaid because they were unaware of hours added to their balance • Manual entry errors difficult to identify/correct (usually caught by employee/agency) • Leave donations tracked in an excel sheet not available to agencies/employees • Submission and approval due dates not visible on the form resulting in rejections of donation

SWOT - HR-110-040 Manage Luma WFM System Access

Process	S / W / O / T	Description
HR-110-040 Manage Luma WFM System Access	**Strength**	• Access to I-Time automated when employee is hired/terminated • Employee access is managed at the agency level • Agency sets up/maintains org structure in I-Time
	Weakness	• CPO access (person who submits time for processing) can only be given by SCO • Easy for CPO to change themselves to another role and leave the agency with no one to submit time - requires SCO intervention • Employee loses access when changing positions until the agency CPO gets them setup - results in employee receiving a harsh message when they try to log in • New employees/employees with new positions cannot enter time until the agency CPO sets them up which results in no time submission and no pay • CPO has to manually go to the "New Employee" list to see if there are employees needing to be set up • Multiple entry of pay locations/supervisors/approvers makes it easy to miss one somewhere and make time sheet entry/approval impossible

Recap