

HR Generalist Role Workshop

March 21, 2023

Facilitators:

Sheena Coles; Luma Project
Organizational Change
Management Lead

Hanna Hall; Employee Support
Services Manager



Expectations

During the presentation, please take note of the following:



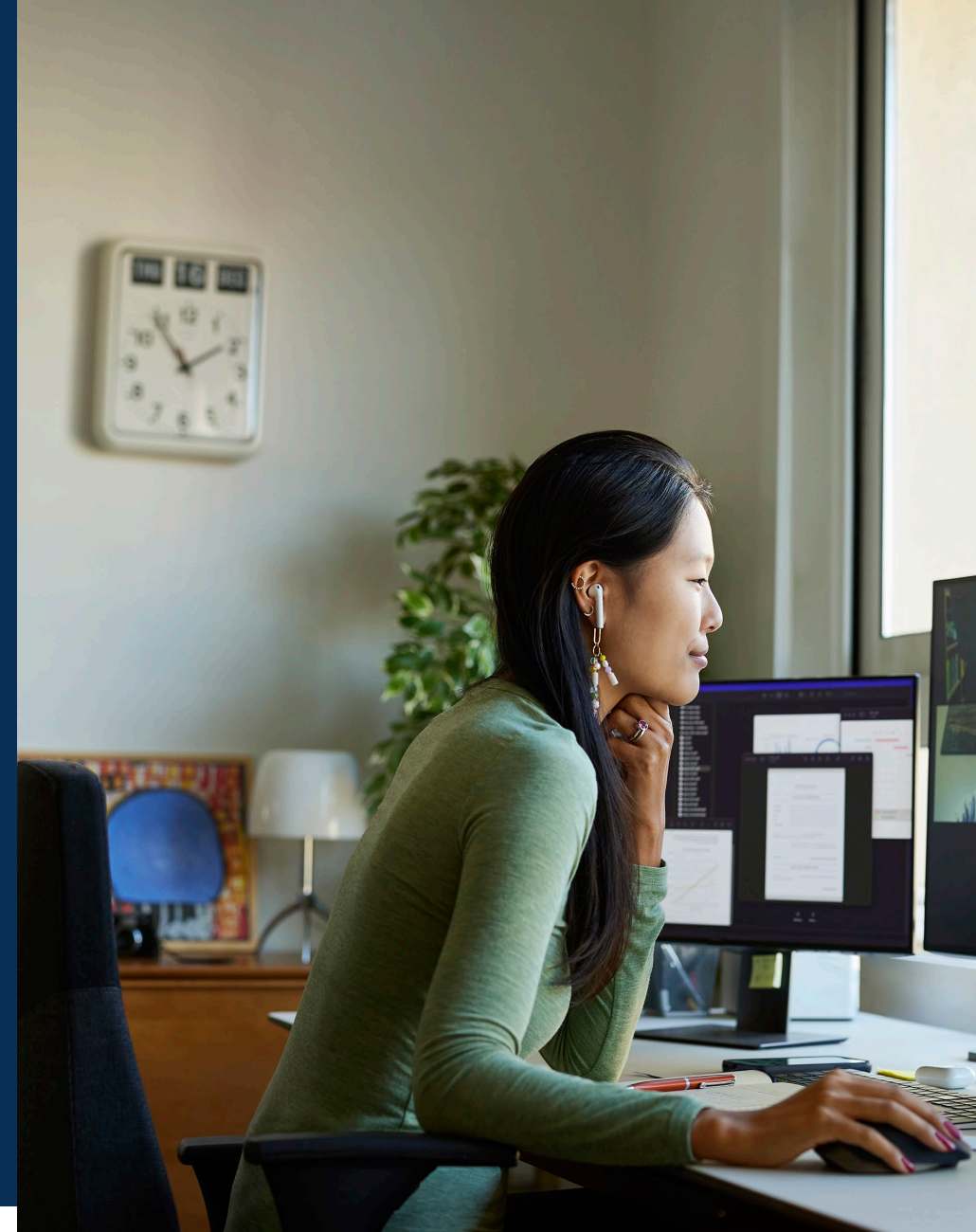
Mute yourself – Please ensure your microphone is muted and give the presenters your full attention.



Chat Functionality – Please utilize the chat functionality (bottom right) to ask questions or wait until the end of the presentation to come off of mute and ask. We will make every effort to answer as many questions as possible during the session, but some questions may require separate discussions.



Follow up – This meeting is being recorded and will be distributed in the follow-up email. Furthermore, we are documenting queries and will publish an FAQ document on the Luma webpage.



Statewide Value

Luma will modernize and transform the way the State of Idaho does business, improving transparency, and providing a core foundation for the future.



One system



Real-time



Dynamic

Statewide Functional Areas and Roles

We will be covering the HR Generalist role.

HR Generalist



There are five additional roles / functional areas that will be introduced in separate Role Workshops:



Manager



Procurement



Recruiter



Employee

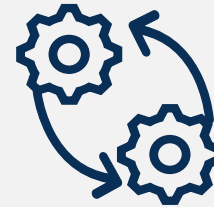


Finance

Objectives



What are you going to do in Luma?



What changes can you expect?



When is this happening?



HR Generalist Tasks*



Employee Changes

- Initiate, update, and complete employee movement such as transfers and promotions
- Approve, return, or deny movement request
- Approve, update, or reject leave request such as Family Medical Leave (FMLA) and Military Leave



Employee Data

- Review and approve personal data or work-related changes
- Change an employee's relationship to the organization, like employee to contractor
- Manage access to confidential information



Performance & Goals

- Review performance appraisals and support employees' appraisal process if necessary
- Review and support employee goal creation



Compensation

- Initiate pay rate changes, bonuses, and other one time-payouts
- Review employee compensation profiles



Benefits Administration

- Confirm employee information for benefit eligibility
- Monitor ACA benefit compliance for all rehired and part-time employees
- Review Employee payroll adjustments for medical/dental/FSA/HSA/Life/VTL
- Review & Approve payroll adjustments for voluntary retirement plans
- Initiate one-time deductions for any missed payments in the voluntary retirements plans or NCPERS

there will be HR Generalist 1, 2, and 3 roles with varying levels of access and authority

Culture and Innovation Changes



Digital-first approach

Enhanced security

One state mentality

Changes by Process

The next few slides detail what is changing and the impact of those changes for the below processes.



Jobs and
Positions



Employee Data



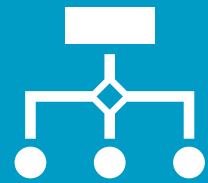
Employee
Changes



Benefits and
Occupational
Health and Safety



Miscellaneous



JOBS AND POSITIONS

HOW WILL THE TRANSITION TO LUMA AFFECT JOBS AND POSITIONS?



What is changing

Impact of that change

In Luma, some information added to jobs and positions will default to different actions such as hires, transfers, and requisitions. Most of the defaulted information can also be overridden.

01

Removes the need to manually enter certain information as Luma will inherit information from a job or position to an associated action.

Organizational charts will be created, maintained, and updated in Luma.

02

Increased visibility into and up to date organizational structure and supervisory hierarchies.



EMPLOYEE DATA

HOW WILL THE TRANSITION TO LUMA AFFECT EMPLOYEE DATA?



What is changing

Impact of that change

1095-C tax documents will be accessed through Luma in the same place as W-2s and paystubs.

01

W-2s, 1095-Cs, and paystubs are in one location.

All State employees will be able to independently update their personal demographics in Luma.

02

Decrease of routine personnel information updating by HR staff.

Data quality errors can be identified by the employee themselves, their manager, or HR.

03

Various means, from employee self correction to reporting a defect to HR, can quickly correct data quality errors.

Employees will receive a unique Luma employee ID.

04

Privacy and security for employees is enhanced; employees will no longer use their SSN.



EMPLOYEE CHANGES

HOW WILL THE TRANSITION TO LUMA AFFECT EMPLOYEE CHANGES?



What is changing

Impact of that change

Pre boarding and onboarding tasks will be available in Luma to assign during onboarding.

01

Expedites the new hire process.

Employee changes in Luma will replace IPOPS, EIS, and other systems.

02

Employee changes will occur in a centralized system rather than in multiple systems and programs.

Ability to add comments explaining why a hire date was rescheduled or if an employee is a no-show.

03

Designated field for comments support in keeping records organized.

HR will now have increased visibility into manager structures within a system.

04

Updating manager to direct report relationships will automatically update manager's access to the employee.

HOW WILL THE TRANSITION TO LUMA AFFECT EMPLOYEE CHANGES?



What is changing

Impact of that change

Documentation obtained from the initial hire can be utilized if an employee is rehired.

05

Reduces time spent on requesting and processing documentation. For example, seasonal workers who are rehired.

If an employee transfers to another agency, they are not required to complete new hire paperwork again.

06

Eliminates redundancies: new hire paperwork and materials will belong to an employee and remain valid, including benefit enrollment.

The current manual offboarding process will be replaced and include automated features.

07

HR will be able to initiative offboarding tasks, including exit interviews and separation checklists.



BENEFITS & OCCUPATIONAL HEALTH & SAFETY

HOW WILL THE TRANSITION TO LUMA AFFECT BENEFITS AND HEALTH?



What is changing

Impact of that change

State can send medical, dental, and FSA enrollment files more frequently to current and future carriers.

01

Allows for well-timed and current information to be communicated between agencies/SCO and carriers.

As employees enroll, their payroll deductions will be set up automatically based on their eligibility dates for all benefits.

02

Reduces workload for employees and HR by standardizing process, including Basic Life and VTL.

UTMA and Spousal Basic Life Beneficiary Waivers forms will be linked in the system.

03

Reduces hardcopy files for HR.

The State can create and track job-related or occupational-health requirements in Luma.

04

Employees will receive notifications when occupational-health requirements are assigned and when they are due.

HOW WILL THE TRANSITION TO LUMA AFFECT BENEFITS AND HEALTH?



What is changing

Impact of that change

Safety observation and safety incidents will be recorded and standardized across the State.

05

Safety issues will be logged into Luma and categorized as an observation, near miss, or incident.

Employees will receive an automatic system notification confirming their benefit elections.

06

OGI not required to send manual confirmation to employees regarding their benefit election.

Luma notifies employee if they make an error/ leave a field blank when selecting dependents.

07

Errors are caught during the enrollment process, reducing the amount of work for OGI and SCO.

HR will have increased visibility into employee benefit enrollment information and where applications are in the process.

08

HR will be able to better assist employees with any questions or remind employees who need to finish the enrollment process.



MISCELLANEOUS

HOW WILL THE TRANSITION TO LUMA AFFECT OTHER GENERAL HR TASKS?



What is changing

Impact of that change

Elimination of paper employee files; records will be stored electronically.

01

Elimination of paper-based employee files.

Luma will host information and notices relevant to employees on the Employee Dashboard.

02

OGI can publish notices directly on an Employee's Dashboard, reducing time spent on outreach.

HR Generalists will have access to a greater number and detail of employee leave balances.

03

Simplifies the tracking of employee leave balances, such as FMLA, Military, and Paid Parental Leave.

Luma functionality includes a Learning and Development module.

04

All agencies will have a single platform to publish, deliver, manage, and track learning content.

HOW WILL THE TRANSITION TO LUMA AFFECT OTHER GENERAL HR TASKS?



What is changing

Tracking of appropriated positions changing from a manual to automated process.

05

Luma automatically calculates appropriated positions.

Impact of that change

Road to Go-Live

Role Workshops



You're here!

Agency Participation in Luma Labs



Provide Idaho agency employees an opportunity to experience their COA data, organizational structure, and a sample of basic processes and configurations.

Luma Labs
February - March

Early May: Supplier Portal Go-Live



Vendors across the State can begin registering in the Supplier Portal.

Training for FSM and HCM



Training for human capital management: human resources, time, and pay and finance and supply chain management in preparation for Go-Live.

FSM and HCM Training
May - June

June 11th: HR, Time, and Pay Effective Go-Live (Employees Start Using Luma on June 19th)



Transactions effective June 11th and later must be executed in Luma. Agencies across the State will have access to Luma to enter these starting June 19th.

July 1st: Finance and Procurement Go-Live



Agencies across the State begin using Luma to conduct budget, finance, and procurement related tasks.

Road to Go-Live

Role Workshops



You're here!

Agency Participation in Luma Labs



Provide Idaho agency employees an opportunity to experience their COA data, organizational structure, and a sample of basic processes and configurations.

Luma Labs
February - March

Early May: Supplier Portal Go-Live



Vendors across the State can begin registering in the Supplier Portal.

Training for FSM and HCM



Training for human capital management: human resources, time, and pay and finance and supply chain management in preparation for Go-Live.

FSM and HCM Training
May - June

June 11th: HR, Time, and Pay Effective Go-Live (Employees Start Using Luma on June 19th)



Transactions effective June 11th and later must be executed in Luma. Agencies across the State will have access to Luma to enter these starting June 19th.

July 1st: Finance and Procurement Go-Live



Agencies across the State begin using Luma to conduct budget, finance, and procurement related tasks.

Road to Go-Live

Agency Participation in Luma Labs



Provide Idaho agency employees an opportunity to experience their COA data, organizational structure, and a sample of basic processes and configurations.

Early May: Supplier Portal Go-Live



Vendors across the State can begin registering in the Supplier Portal.

June 11th: HR, Time, and Pay Effective Go-Live (Employees Start Using Luma on June 19th)



Transactions effective June 11th and later must be executed in Luma. Agencies across the State will have access to Luma to enter these starting June 19th.

July 1st: Finance and Procurement Go-Live



Agencies across the State begin using Luma to conduct budget, finance, and procurement related tasks.



Get Luma Support

If experiencing errors, employees will be able to submit a service ticket for assistance



Reference Materials

User guides and training materials will be available to support self-support efforts.



Sustainment Team

An entire team will be hosted by the State Controller's Office to support the transition to Luma

Post Go-Live: Sustainment

* Dates subject to change

Luma Training:

- Training will be available as stand-alone/self-paced and instructor-led (virtual) courses
- An individual's role will determine the type/amount of training needed
- Generally, core users (frequent Luma users) will need more instruction
- The Training Showcase Kickoff in early March will provide additional details



*Specific dates to be communicated separately.

Preparing for Luma

In addition to formal training, you will be provided with the following resources to make sure you are confident, knowledgeable and comfortable to complete your work in Luma.

USER EXPERIENCE SIMULATIONS, LUMA LABS, AND MONTHLY COMMUNICATION TOOLKITS

User Experience Simulations, Luma Labs, and the monthly Change Liaison Communication Toolkits are activities and resources designed to inform agency employees of changes associated with Luma and demystify the system.

READINESS CHECKLIST

As a component of the Readiness Program, the Readiness Checklist will outline actions to complete to ensure your agency is prepared prior to system go-live. The checklist will be proactively updated and available on the Luma website in late March.

REVISIT EXISTING COMMUNICATION CHANNELS

Familiarize yourself with information already available about the Luma Project by visiting the [Luma Website](#) and the [Luma YouTube Page](#).



Resources

Have questions? Please contact or access the following:



Agency leadership and supervisor – You direct supervisor and agency leadership should be your first stop with question and concerns. They are ready to coach, guide, and support you.



Change Liaison – each agency has an assigned Change Liaison who supports the project's implementation. Each month they receive a communications toolkit to distribute to peers and staff.



Agency Advocate – our Agency Advocates sit within the State Controller's Office and are dedicated to a subset of agencies. They're here to support you and your staff as we cross the finish line to Go-Live.

Danielle Stevens
dstevens@sco.idaho.gov
208-332-8868

Krystal Griffith
kgriffith@sco.idaho.gov
208-334-3100

Chris Lehosit
clehosit@sco.idaho.gov
208-332-8887

Elijah Stearns
estearns@sco.idaho.gov
208-332-8871



Questions?

