End to End HCM

HERUG 2016
Ned Neeley, Duke University
Agenda

- Duke Background
- End to End Definition
- Where we started
- What have done since
- Tools we have used with Examples
- Questions
Duke Background

- University and Health System
- Shared Services for Corporate Payroll and HR
- Decentralized HR for Schools and Departments
  - School Medicine Schools, Engineering, Divinity ...
- Health System decentralized by entity
  - Hospitals, Corporate Services, Support Organizations ...
- 38,000 employees
- 100,000 MSS transactions processed per year
- 6,800 New Hires, 6,900 Terminations
- 49,000 W2s
- 29,000 Employee Medical Benefits
- 5,400 Retirees who have Medical Benefits
End to End...
... is very difficult to support

- Timing of SAP adoption
- Best of breed approach
- Approach to customization and new development
- New requirements not anticipated by major vendors
- New Services offered by spot providers
 Implemented SAP Payroll and HR with little process automation

- 2002 Go Live
- Focused on Paying Employees correctly
- Large Amounts of Manual Data Entry
- Many Interfaces
- Custom Reports
- Out sourced open enrollment
- Stand alone applicant tracking system

while laying a solid foundation.
Since then we added ...

- Manager Self Service
- IBM/Kenexa/BrassRing for Applicant Tracking
- Faculty System – Appointments, Promotion & Tenure
- Employee Self Service
- SAP Performance Management
- Contract Labor – Temporary Staffing
- Annual Salary Setting Process
- Payments for Secondary Jobs
- Non-compensatory payments
- Saba Learning Management System (Health System Managed)
- Health System Labor Management Process
- Benefits Enrollment – Open, Newly Eligible, Life Events
- Success Factors Performance Management
- ACA Compliance and Tax Reporting
- Succession Planning (Health System reviewing vendors)

With a focus on end to end process.
… with internal and external service providers.

- **On Premise**
  - ECRT
  - API
  - SABA
  - BW
  - EP
  - SAP

- **Cloud**
  - Brass Ring
  - Success Factors

- **Services**
  - Info Mart
  - Equifax
  - Wage Works

- **Vendors**
  - Benefit Vendors
  - 403B Vendors
  - Banks
  - 403B Vendors

- **API**
  - SAP
  - EP
  - BW
  - SABA
  - API

- **Success Factors**
  - Brass Ring
  - SAP
  - BW
  - EP

- **On Premise**
  - ECRT
  - API
  - SABA
  - BW
  - EP
  - SAP

- **Services**
  - Info Mart
  - Equifax
  - Wage Works

- **Vendors**
  - Benefit Vendors
  - 403B Vendors
  - Banks
Discuss the tools we repeatedly used

- Organization Management
- Infotype Configuration and Customization
- Manager Self Service Tools
  - Object and Data Provider
  - HCM Processes & Forms
- Workflow
- Enterprise Portal

and show a few examples.
Organization Management tools

- Effective Dated Organization Structure
  - Organizations, positions, jobs
- OAM Security
  - Limit Access to specific organizations
  - Faculty Appointments
- Position based security
  - Assignment of roles to positions
- Custom relationships and objects
  - Primary Effort Coordinator
  - Labor Management Administrator
  - Salary Administrator
- New Evaluation Paths
Example: Expected Job Results (EJR) Catalog

- Manager’s catalog of performance criteria that can be easily assigned to employees
- Built from existing objects in SAP
- Integrated with SAP Performance Management
- Simplified and Streamlined the performance management process in the Health System
- Abap development
Maintain Expected Job Results

Performance Year: 2016

Title: SSA-DukeShift/CSO Manager

Achieves Expectations:
1. Ninety percent of eligible departments actively participate in DukeShift including daily reconciliation
2. Fill rate for staffing request greater than 80%
3. Ninety percent of eligible departments actively use the scheduling system
4. 100% participation of Admin Clerk at bedflow meeting with error rate less than 1%

Exceed Expectations:
1. Ninety-three percent or greater of eligible departments actively participate in Duke Shift including daily reconciliation.
2. Fill rate for staffing request greater than 85%
3. Ninety-five percent of eligible departments actively use the scheduling system.
4. 100% participation of Admin Clerk at bedflow meeting with error rate less than 1% and the staffing and scheduling system updated within 1 hours of bedflow.
EJR Assignment

Unassigned Employees

<table>
<thead>
<tr>
<th>Name</th>
<th>Job Title</th>
</tr>
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<tbody>
<tr>
<td>ABRAM, GWENDALINA E</td>
<td>ADMINISTRATIVE ASSISTANT</td>
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<tr>
<td>BAMBACH, JULIA L</td>
<td>STRATEGIC SERVICES ASSOCI</td>
</tr>
<tr>
<td>BYNUM, TERRY L</td>
<td>RECRUITER</td>
</tr>
<tr>
<td>CARRIGAN, REAIA E</td>
<td>PROGRAM SPECIALIST</td>
</tr>
<tr>
<td>CHRISTOFF, BARBARA</td>
<td>RECRUITER</td>
</tr>
<tr>
<td>CLEARMAN-SKY, REBECCA C</td>
<td>RECRUITER</td>
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<tr>
<td>CUNLiffe, JENNIE</td>
<td>BUSINESS MANAGER</td>
</tr>
<tr>
<td>HEADSPETH, NIGERIE N</td>
<td>RECRUITER</td>
</tr>
</tbody>
</table>

Assigned Employees

Achieves Expectations
Traveler utilization is within budget.

Exceeds Expectations
Traveler utilization is 10% less than budget.
## Employee EJRs

**List of Employees and EJRs**

<table>
<thead>
<tr>
<th>Name</th>
<th>Unique ID</th>
<th>Job Title</th>
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<tr>
<td>BAMBAKA, JULIA L</td>
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<td>BYNUM, TERRY L</td>
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<td>372359</td>
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<td>CUNLIFFE, JENNIE</td>
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<td>MARTIN, CHERRY R</td>
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**Quadrant**

- **Work Culture**: Managers - Mgt of Staff Performance 2016
- **Finance**: SSA - 2016
- **Customer Service**: Gen - All Staff 2016
- **Clinical Quality**: SSA - DukeShift/CSO Manager
Infotype Configuration and Customization

- New subtypes for Duke content
  - Addresses
  - Job Description components
  - Appoint Faculty, School
- Custom infotypes
  - Additional Faculty Data
  - Forms status management
  - Vesting
Example: Job Descriptions

- Created new description subtypes on the position and job
- Job descriptions are displayed on the HR Web site
- Job descriptions are part of the requisition when posting a job
- Preferences are added to the job description and stored on the position
- Integrated with requisition processing
- Posted to external website from SAP
- [Clinical Nurse Job Description](#)
Manager Self Service tools

- **Object and Data Provider**
  - Searches – Employee, Position, Security, Grant Manager, Cost Center Labor Management Request
  - Organizational based views
    - Primary, Secondary Appointments by Organization

- **HR Forms & Processes**
  - The forms processing framework delivered in MSS can be easily extended to other areas.
    - Position Management,
    - Secondary Jobs,
    - Non-Compensatory Payments
    - Appointment, Promotion and Tenure of Faculty,
    - Labor Management Requests
Example: Labor Management Process

- Health System process to request labor
- Employee and contract staff
- Integrated with performance metrics
- Uses org management relationships
- Uses object and data provider for navigation
- Uses HR forms and processes
- Predecessor step to create position, reclass position, open requisition
### Cost Center and FTE Summary

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<tr>
<td><strong>HEART COMMUNICATION CENTER</strong></td>
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#### Cost Center Paid FTE Summary

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<th>MTD Actual</th>
<th>MTD Flex Budget</th>
<th>MTD Budget</th>
<th>YTD Actual</th>
<th>YTD Flex Budget</th>
<th>YTD Budget</th>
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#### Cost Center Worked FTE Summary

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<th>MTD Budget</th>
<th>YTD Actual</th>
<th>YTD Flex Budget</th>
<th>YTD Budget</th>
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#### Cost Center Overtime Summary

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#### Cost Center Units of Service (UOS) Summary

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<th>YTD Budget</th>
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<tr>
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#### Cost Center Worked hours per UOS

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#### Cost Center Turnover

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<th>Termination</th>
<th>Percentage</th>
<th>Turbulance</th>
<th>Percentage</th>
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<tr>
<td>1.0000</td>
<td>5.60</td>
<td>1.0000</td>
<td>5.60</td>
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</tbody>
</table>

### Requested Position Information

- **Request Type:**
- **Job Code:**
- **FTE:** 0.00
- **Split Coded:** No
- **Labor Type:**
- **Budget Status:**

### Requested Job Code

<table>
<thead>
<tr>
<th></th>
<th>MTD Actual</th>
<th>MTD Flex Budget</th>
<th>MTD Budget</th>
<th>YTD Actual</th>
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Workflow

- Uses z objects and other relationships
- Associated with organizations and positions
- Looks up the org structure from the employee’s owning organization
- Supports multi-step sequential and parallel tasks
- User definable routing rules
- Initiator–approver–processor model
- Updates infotypes after final approval
- Sends and receives data to/from applicant tracking system
- Receives data from background check vendor
- Receives data from Electronic I9 vendor
Example: Qualifying Life Events (QLE)

- Employee Self Service request with workflow
- HR Forms and Processes
- One step approval with automatic update after approval
-Attachments used for supporting documentation
Example: QLE

Search: QLE

Results List: 11 results found for QLE

- You got married and you want to add your spouse and/or new dependents to your health plan.
- You got married and you are gaining coverage through your spouse’s plan.
- You had a baby or adopted a child or were placed for adoption.
- You got divorced and you and eligible dependents lost coverage.
- You got divorced and you want to remove dependents from your coverage.
- You or a covered dependent GAINED group insurance coverage (coverage must be a student, individual policy or obtained...)
- You or a covered dependent LOST group insurance coverage (coverage must not be a student or an individual policy).
- Death of spouse and you are losing your coverage.
- Death of a covered dependent and you need to remove dependent from your coverage.
- You’ve had a change in health insurance eligibility due to relocation or outside of current network area.
Example: QLE

<table>
<thead>
<tr>
<th>Plan Name</th>
<th>Coverage</th>
<th>Starts On</th>
<th>Pre-Tax Costs</th>
<th>Post-Tax Costs</th>
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</table>
Enterprise Portal

- Multi-Factor single sign-on with Shibboleth/SAML2
- Single access point for all users
- Seamlessly integrates non SAP content from inside and outside of Duke
  - Wage Works – Flexible Spending Accounts
  - Duke Account Services
- Integrated security with ECC through group assignments
- Ability to merge roles to simplify navigation
Example: Merging MSS Portal Roles

- All MSS users have the same tab structure in the portal
- Based on security roles in ECC additional tabs or items are added under the standard tabs
- Central users will have reports added to the Reports tab that are not available to departments
- Support users will have a new tab with other features
Example: Additional tabs

Standard Tab Structure

Additional tabs added
Example: Merged items

Standard content

- HR Reports
- Time Reporting
  - University Time Reporting (Non API)
- Payroll Reports

- Exempt Time Off Reporting
- iForms Workflow Status Reporting
- College Work Study
  - Awarded, disbursed and balances for College Work Study

Additional content added to reporting tab

- PR Time Reporting
  - University Time Reporting (Non API)
- PR Payroll Reports
- Exempt Time Off Reporting
  - Exempt Time Off Reporting (University)
- Non-Comp Reporting

- iForms Workflow Status Reporting
- College Work Study
  - Awarded, disbursed and balances
- DTS Reports
  - DTS Position & Timecard Reports
- HRIC Reports
Questions

- Ned.neeley@duke.edu