HRS

Employee Self-Service & Manager Self-Service

Project Charter

1. INTRODUCTION:

A major functionality of HRS is the ability for employees to utilize the Time and Labor and Absence Management (TLAM) Employee Self-Service (ESS) and Manager Self Service (MSS). It is a convenient and secure resource accessed online via the MyUW portal. It will enable UW employees, including student employees, to see their individual records, but also provide tools to give them more control of their personal information, enter time worked and request time off (absences).

2. CHARTER PURPOSE:

This charter was developed to help campuses take ownership of their own ESS/MSS Roll-out plan and strategize the use of HRS resources in their successful roll-out.

HRS Training will support the payroll coordinators by providing a Readiness Checklist, resource tool-kit and links to additional items such as videocasts, etc. The charter provides a vehicle for campuses to strategize their usage of HRS Training resources.

3. KEY STAKEHOLDERS:

For ESS/MSS to be a success, special attention is required, as employees will need to be informed and trained on the aspects of ESS/MSS. Who will be your campus/department stakeholders? Consider the primary users of ESS/MSS:

- ☐ UW employees – use ESS for time worked entry, request time off, etc.
- ☐ UW managers – use MSS to review and approve/disapprove time and absences.
- ☐ Additional Campus Training staff (if appropriate)
- ☐ Campus communications
- ☐ Information Technology resources (setting up kiosks, campus ID assistance)

Other Campus Stakeholders: (Please complete as appropriate for your campus/department)

- ☐ _____

- ☐ _____

- ☐ _____

- ☐ _____

- ☐ _____

4. PROJECT SCOPE:

The scope of ESS/MSS responsibility for campuses is the dissemination of information, presentation of HRS materials, and conducting support for users. The following should be considered and positioned for ESS/MSS success at a campus:

- Empower the campus payroll coordinator, division or department staff, to be the primary source of ESS/MSS information and support for their staff.
    - o The current classified payroll period has increased workload for the payroll coordinators. **This will require partnership with HRS to develop a roadmap for readiness and a tool kit for payroll coordinators to successfully train their staff on how to use ESS/MSS.**
    - o **Each campus should strategize how they will release PY Coordinator staff to work with their ESS/MSS audiences.**
- General communication or marketing material to maximize ESS/MSS exposure for payroll coordinators to inform and share ESS/MSS with their staff.
- Present HRS Training materials to ESS/MSS audience and host/conduct open-labs for supervisors.

Your campus/department scope ideas:

☐ _____

☐ _____

☐ _____

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5. ESS/MSS READINESS PREPARATION:

Given the project scope, we have identified a few stages for the campus and/or divisional leadership and payroll coordinator to contemplate ESS/MSS and how to best get their employees ready for access.

- o Below is a *draft* Readiness Checklist:

Go-Live Planning:

☐ Use your campus ESS/MSS Go-Live date to plan all aspects of the implementation, scheduling backwards from that date. Allow for contingencies.

Significantly In Advance to Go Live:

ESS/MSS Communication:

Consider your employees and the best way to distribute information.

☐ How will you inform your employees regarding the Go-live date of ESS/MSS?

- o Identify how to communicate ESS/MSS information.
    - ▪ Examples include: informative emails, posters, brochures, etc.
- o Communicate how employees will learn the new process and how ESS/MSS is different from current system.

HRS Readiness for ESS/MSS:

☐ Validation of data collection:

- o For ESS/MSS users, a security role is required: Do all of your employees have the correct security role?
  - ▪ Security roles need to be assigned through the IAM Security Process.

- o Time and Labor Security page: Is it complete and correct for each ESS/MSS employee?
  - ▪ Payroll coordinators and time approvers need to be assigned to allow for time/absence approvals.

☐ Review staff schedules:

- o Is the correct work schedule assigned to ESS/MSS employees?

- o If an Auto Lunch is part of the employee's schedule, this should be verified. Is the length of time (minutes) is correct for the Auto Lunch? Is the Auto Lunch listed on both the Assign Work Schedule and the Time Reporter Information pages?

Change Management:

☐ Identify campus/departmental advocates for ESS/MSS.

☐ Think about your campus/department ESS/MSS support strategy.

- o Do you have staff that will be dedicated to work with the supervisors when MSS is implemented?

☐ Consider your current business processes. Think of how employees currently report time and request/report absences.

- o Will any of the processes need to be altered with the completion of ESS/MSS?

Back-up Plan:

☐ What to do if things do not work as planned?

- o Do you have a paper process backup ready in the event of downtime or significant system issues?

Training Employees to use ESS/MSS:

ESS/MSS campus leadership team members may have the knowledge and expertise of ESS/MSS but may not have the time to develop training materials. With this in mind, HRS Training will develop a *Tool-kit* provides a variety of choices the campuses/departments can pick and choose to use for their ESS/MSS efforts.

Training Arrangements:

☐ Review the HRS Training Tool-kit to identify the tools you will use for training employees.

- o What tools will you use to prepare your employees for ESS/MSS?

- o Think about those employees not able to attend presentations. Will you offer videocasts or self-paced presentations?

☐ If you plan to conduct face-to-face presentations, do you have a location to conduct the training?

  o Have the room(s) been reserved?

  o Will you offer Open Labs for employees after ESS/MSS go-live? If so, do you have computer lab(s) reserved? Who will staff the open labs?

☐ Providing timely and efficient technical (triage) support is important for ESS/MSS users/approvers as they learn the new processes system.

  o Triage support scheduled for ESS/MSS users/approvers?

    ▪ Identified who will provide triage support for your campus/department/division?

Training Tool-kit:

The Tool-kit provides a variety of choices that campuses/departments can pick and choose to use for their ESS/MSS efforts. The following is a list of all the tools available.

Facilitator Guide:

- The Facilitator Guide is a training template which can be a starting point for payroll coordinators and/or supervisors leading ESS/MSS staff training efforts.

Presentations:

- The presentations can be modified by payroll coordinators and supervisors to meet specific site needs. Additionally, these presentations can be modified for employee self-paced viewing.

Videocasts:

- Short, 5- to 10-minute presentations with a voice-over narrative.

- Examples of Videocasts: (This list is videocasts available as of August 2011)

  ▪ ESS & MSS Time and Absence Terminology

  ▪ Overview of Timesheets

  ▪ Exceptions on a Timesheet

  ▪ Correcting Absences

  ▪ How to Read an Earning Statement

Knowledge Base documents:

- The following KB documents are relevant for training purposes:

  ▪ Time & Labor and Absence Management Terms – 17272

  ▪ Review Absence Balances – 18200

Frequently Asked Questions – FAQs Document:

- Assembled from HRS Training face-to-face training experiences; the FAQ contains answers to the most frequently asked questions, from an end user perspective.

Training Timeline:

The draft ESS/MSS training timeline encompasses *four weeks*, however to accommodate the processing of bi-weekly payrolls, **the timeline is estimated to span six to eight weeks**.

- o Below is a *draft* Training Timeline.
- o **NOTE -** the dates for the September A bi-weekly payroll period is utilized to demonstrate the processing of bi-weekly payrolls.

Pay Period	Pay Run ID	Pay Period	Pay Date
Sep A	2011BW09A	08-28-2011 - 09-10-2011	09-22-2011

Date(s)	Administrative Activities	Quality Enhancement Activities

August 1-22 *NOTE: This could occur <u>at least</u> two months before ESS/MSS Go-Live*	*Provide Coordination*
	
	Responsibilities include:
	• Communication to staff of ESS roll-out
	• Ensure employees have correct ESS/MSS access
	• Develop a plan for ESS/MSS implementation
	  o Identify staff to use ESS/MSS
	  o Identify key players to support ESS/MSS roll-out
	• Reserve rooms for training and open lab sessions
	• Identify the "champion" or lead for the ESS/MSS roll-out
	• Begin to identify change advocates in your divisions
		Develop Outcome/Evaluation Processes
		
		• Peruse the Training Tool-kit
		  o Identify tools to use for training sessions
		  o Identify tools for those employees not able to attend training
		• Peruse/identify the Quality Gateways
		  o Identify how to evaluate ESS/MSS training sessions
		  o Choose at least one feedback method i.e. Likert style questionnaire
		  o Identify/create your own quality gateway if appropriate

Aug. 22, 23 & Sept. 1, 2	*Conduct Training* ESS/MSS Presentations for: • Supervisors/Approvers • Employees	*Did Learning Occur?* • Distribute to training participants Quality Gateways
Aug. 26-31	*No ESS/MSS Activities -* Payroll Coordinator(s) process August B payroll	
Sept. 6 & 7	*Training – Open Lab Opportunities* Open Labs for: • Employees – assistance with entering time • Supervisors/Approvers – assistance with approving time	*Evaluation* • Evaluate the results from Quality Gateways • After working with employees/supervisors in Open Labs, identify "gray" areas – are there areas that need further ESS/MSS training?
Sept 8 & 9	Payroll Coordinators run reports and troubleshoot time entry/approval	

One Week Prior to Go Live:

- ☐ Verify a schedule for the ESS/MSS Go-Live day, including reviewing to check readiness, speak with the support staff, super users, etc.
- ☐ Review escalation procedures to follow in the event of a problem.
    - ○ First level - department or division or campus support staff
    - ○ Second level - UWSC support center
- ☐ Setup time for department or division or campus first level support staff for buffer-breaks, huddles, debriefing, etc.

Day of ESS/MSS Go Live

- ☐ Consider a type of team building event that encourage employees to approach the day with a sense of humor.
- ☐ ESS/MSS campus leadership team double check all readiness.
- ☐ ESS/MSS campus leadership team members prepare to respond to any contingency as planned. This will mean that certain staff will not perform routine duties, but they will dedicate the entire day to being in a state of readiness (including being prepared to "do nothing" if all goes well).
- ☐ Whether or not there appears to be a need, conduct any planned buffer-breaks, huddles, and debriefing — *if only to celebrate success*. This reduces stress and relieves pressure to do more than what was planned.
- ☐ Determine staff schedule for Day 2 and adjust as necessary. ESS/MSS Go-live may require several days of similar scheduling.

6. RISKS:

A risk is an uncertain event or condition that, if it occurs, has an effect on a project's objectives. Take a moment to consider any identifiable obstacles (risks) that may prevent the successful achievement of an ESS/MSS implementation. For example, risks may be associated with:

- Unresolved assumptions:
    - ○ Will your staff have access to computer(s) to input their time/absence?

- Function with new/unfamiliar technologies:
    - ○ Does your staff have basic computer skills to navigate the Portal and ESS/MSS?

- Missed deadline(s):
    - ○ What happens if the Timeline takes longer than anticipated?

- ESS/MSS not performing to specifications:
    - ○ If the Portal goes down or the Absence link on the Portal page is not working correctly, how will this be communicated?
    - ○ Is there a back-up plan for employees to enter time worked?

Each risk should be considered before ESS/MSS implementation. This will help to quantify and prioritize your ESS/MSS risk responses.

7. Pros & Cons

When considering ESS/MSS it is imperative to consider both the pros and cons of this service:

Pros	Cons
Employees will be responsible for their own time entry.	May need to remind employees to submit their time worked.
Supervisors play a key role in tracking and approving employee time.	Additional analysis of submitted time i.e. running and reviewing reports and queries.
Decreased data entry from paper timesheets.	An increase of troubleshooting to resolve time/absence errors.

8. MILESTONES:

The HRS Project will align ESS/MSS Go-Live with an Institutional Readiness Completion Checklist (IRCC). Additionally, the following represent milestones with estimated completion dates.

Event or Deliverable	Target Date	Responsibility
Project charter approved by campus		
Readiness Checklist completed		
ESS/MSS Implementation Schedule Developed		
Quality Gateway assembled		
Project Closed Out		

9. CAMPUS APPROVAL DECISION:

☐ Approved, development of detailed project plan is authorized
☐ Approved, project execution is authorized
☐ Approved, but project is on hold until future notice
☐ Revise charter and resubmit for approval
☐ Charter and project proposal are rejected

Role or Title	Name and Signature	Date

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Revision History

Name	Date	Reason For Changes	Version