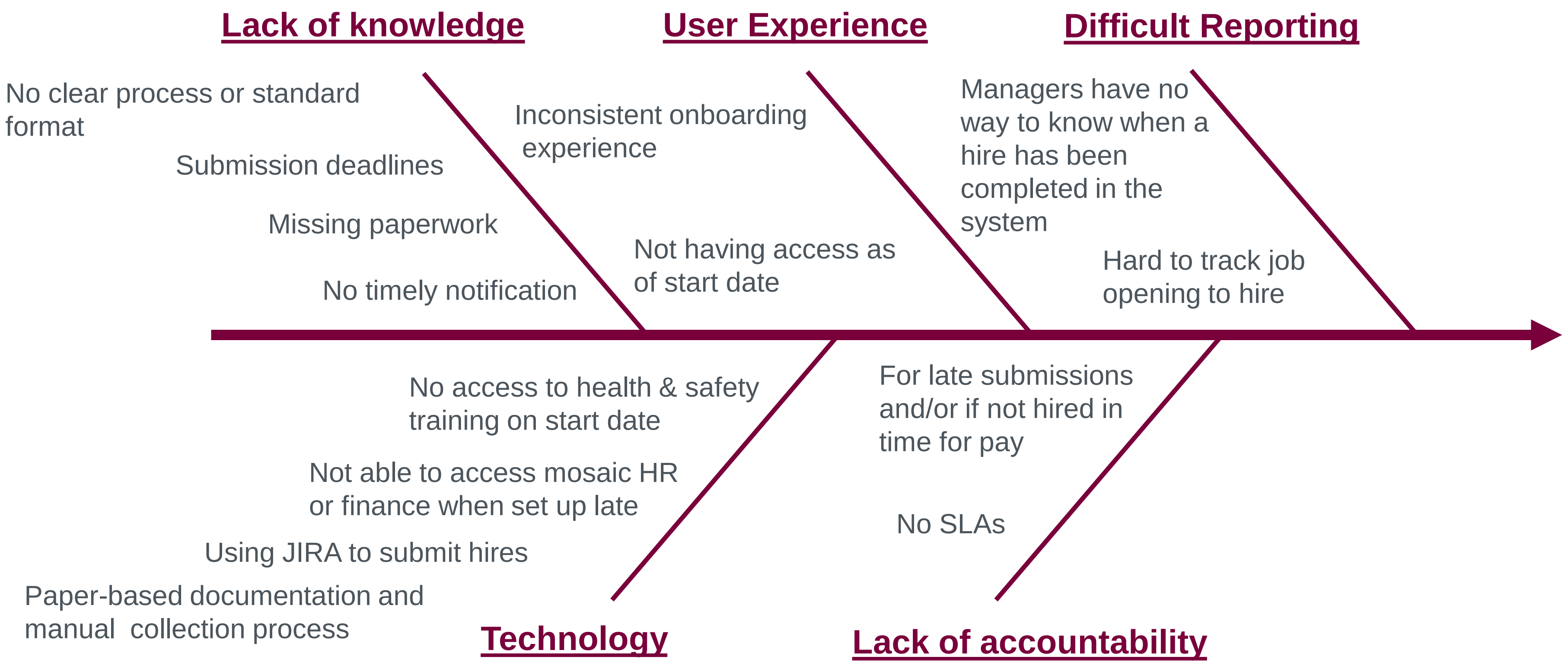
Digitization or New Hire Transactions

Setting up new hire into Mosaic Process Optimization: Root Cause Analysis



Problem Statement

Hire is not being completed by start date due to the lack of standardized process significant hiring volume, & paper-based manual tasks associated with the process

Information taken from the hire to pay taskforce stakeholder sessions & exercises

Project Charter: System Onboarding Digitization

Objectives

- Analysis of the current process for new hire set up to create a standardized process & utilize technology to decrease manual entry
- Engaging all the groups that are involved in submitting hires
- Include Health & Safety training in onboarding module

Key Activities

- Process analysis
- Discovery
- Stakeholder consultation
- Requirement gathering
- Solution build and integration
- Change Management & Communication

Deliverables

- Robust & seamless new hires setup into the Mosaic prior to the first day of employment
- Hire eForm to expand self-service functions in the department to include job data that drives on-boarding and safety training, etc.
- Digitize and automate the employee documentation collection process – no paper!
- Remove JIRA from the workflow

Scope

- The time period after a successful candidate has accepted a job offer until the employee has been hired in system
- Out of scope: the recruitment process
- All employee groups are inclusive

Critical Success Factors

- People are adopting the new process
- Standardized process with fewer or no exception
- Decreased the manual work for employees, departments and HR
- Drive data and payroll accuracy
- Increase satisfaction from employees, managers and administrators

New hire set up - Looking to the future

Future State Vision

If MacID is required- Pre-hire eForm is submitted → Hire eForm is submitted → Hire eForm is reviewed & approved by data team → Systems onboarding module is activated → Post-work completed

- *If MacID is required-* Pre-hire eForm is submitted: CI creates person record & MacID
- Hire eForm is reviewed & approved by data team: CI creates Job data record
- Systems onboarding module is activated: Employee inputs citizenship data, emerg contact, reviews personal information, banking & submits benefit forms
- Post-work completed: Data team completes schedule/comp plan enrollment/taxes/ benefits

- Creates a standardized process for all hiring managers & recruitment coordinators
- Removes non-value-add work including sending a JIRA, triaging JIRA ticket, populating person or job records, entering banking & personal information, entering job data
- Improved onboarding experience for new employees

Additional Information & considerations

- **1 Hire eForm to be created**
  - If completed the pre-hire eForm→ enter eForm ID for employee information to populate
    - Additional information needed: contract end date (if applicable) & rate
  - If pre-hire not completed→ provide employee ID, start date, position number, rate, contract end date (if applicable)
  - Consideration for approval workflow:
    - 1- If JO # is approved- no approvals on eForm→ workflow would be straight to HR
    - 2- If no JO# provided → follow workflow for recruitment approvals
    - 3- Straight to HR & no departmental approvals since the employee has already signed the offer letter

- **Refresh the system onboarding (ESS) module to facilitate EE documentation collection**
  - Open up Employee Self Service Banking
    - All EE are now on MFA which was a prior dependency
  - Investigate the possibility of tax data writing directly to the Update Employee Tax Data page
  - Utilize eSignature so employee’s do not need to print & reupload forms
  - Consideration: there is an onboarding component of the JHA process refresh which will need to be included
  - Consideration: Implement the ESS benefit enrollment so data team does not have to enter benefits into system

Next Steps

Exact timelines to be determined

1. Share information with the HR Working group in May 2023
2. Complete stakeholder register with representatives from each Central Faculty, Faculty of Health Sciences, Student Services, and Admin/Auxiliary departments, HRBPs and CoPs
3. Book stakeholder engagement sessions

   Plan the questions/information required for the sessions
4. Complete requirements gathering for both the Hire eForm & refresh of the onboarding module
5. Review resources for both internal HR project team & UTS

   Implementation Roadmap

Pain Points with the TA payment process (Group A & B)

- **Extremely manual processes with significant hiring volume each term**
- TA paperwork is coming from several channels (SGS, Department Administrators, TA's, **JIRA, MacDrive, SPP Form, etc.) which created a lot duplicated efforts and data discrepancy leading to pay errors**
- Any changes to TA-ships after they are completed through JIRA and J**IRA's inability to receive and store mass hiring documentation**
  - For group A they will remain on the mass hire file which can lead to overpayments
- Not consistent communications to department administrators & TA's for required documents/deadlines
- No easy way to collect payroll information or ability for TA's to enter their own banking
- Retroactive TA payments – sometimes receiving TA paperwork several pays into the term
- Department input deadline for the SGS database is the last 2 weeks of August- no ability to move this deadline due to their validations, t**hen data is locked for the entire 12 month – resulting in many data discrepancies and pay errors**

Next steps for TA's – Recommendations

- Interim solution including –
  - Set up touchpoints with key partners to provide updates on deadlines, and information for September TA hires
  - Use effective communication (meetings, teams group)
  - Provide a clear process for departments to follow
  - For Group A TA only:
    - Outline a clear process for January & May changes from the September Mass hire
  - For Group B TA only:
    - Create spreadsheet template for submissions to enable the uploading function vs manual entry input
- Investigate Employee Self Service options to leverage for easier data entry
- Review the one-page declaration the Faculty of Science is piloting to see if it can be used across the board **to reduce duplicate entries**
- Looking to the future:
  - **Developing a new solution to use a similar approach to the TAD process, expanding self-service for the department to submit TA hires essential information that automates the payment process, that would be ready to launch in 2024.**
  - **Automate employee personal information collection process that is embedded in the on-boarding project**
  - SGS & UTS are kicking off the SGS Project for Grad Pay & Records and System Optimization next week→ determine how this project will impact the TA hiring process to automate the contract for the department

Thank you!