

HERE'S HOW WE CHANGED OUR BUSINESS PROCESS HCM

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Session Topics

- Welcome & Introductions (5 min)
- Guest Speaker Panel (25 min)
 - Anthony Carlton (Chula Vista): Our Best Practices (7-10 min)
 - Communicate, Paychecks, Position Control, Timesheets (Tina Schleiger, Sweetwater) (7 min)
 - Timelines (Dawn Pearson, San Dieguito) (7 min)
- Discussion (25 min): What issues/challenges are you finding you have with your business process? How are you working thru them?
 - Group talk (15 min)
 - Report out (10 min)
- Wrap up & Closing (5 min)

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Anthony Carlton (Chula Vista): Our Best Practices

- Our mission/goal: "Payroll is sacred"
- Top-down support
- Bargaining Unit support
- Held weekly Steering Committee meetings during implementation – heads of Budget, HR, Benefits, Payroll all involved in discussions
 - Thorough understanding of how things were previously done in Legacy
 - Work across departments
 - Restarting the committee after the new Fiscal Year started
- Learn about all HCM functionality, not just one piece (understand end-to-end)
- We are reviewing current workflow; determining best workflow within parameters of PeopleSoft
- When the screen involves an effective date that would require a HEAT ticket for a fix, check and be 100% sure before you save
 - As you get closer to deadlines, be extra careful with dates to prevent a HEAT ticket for a fix

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Communicate, Paychecks, Position Control, Timesheets (Tina Schleiger, Sweetwater)

- Implementation strategies:
 - Created committees (HR, Finance, Payroll, Benefits); worked together on validations to minimize errors
 - On our payroll website we included directions for how to access the old paystubs (prior to January 1, 2017) and the new paystubs (as of January 1, 2017). We also advised employees to compare December paystub to January paystub.
- Increased our Revolving cash so if someone didn't receive a paycheck on the 31st we had a way to get them a check on the same day
- Position Control changes
 - Brought HR and Finance Departments together to discuss Position Control
 - Employees no longer have Position # follow them from site to site
 - Needed to change internal system and PARs (Position Action Requests)
- Timesheet Upload
 - Upload all hours from 3rd party system
 - Needed to modify internal system; created validations to audit DBTs and Position #s (compared with PeopleSoft queries)

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Timelines (Dawn Pearson, San Dieguito)

- Rearranged the time of the month certain tasks are completed
 - Moved processing timesheets to the beginning of the month
 - Deadlines for extra time moved up by 3 to 4 work days after the first work day of the month
 - Timesheets uploads to PeopleSoft from the 8th - 10th day each month
 - *Timeline - for October 2017*
 - 10/5 sites closed
 - 10/6 run all reports, enter adjustments, update DBT's
 - 10/10 upload payroll to County
 - 10/11 check all timesheets and substitute transaction
 - Position, salary, funding changes etc follow timesheets uploads
 - Human Resources deadline is the day before first precalc and nothing can be entered into PeopleSoft
 - *After first precalc - Payroll validates and makes necessary adjustments*
 - Overtime
 - *After 2nd precalc there is a final check*

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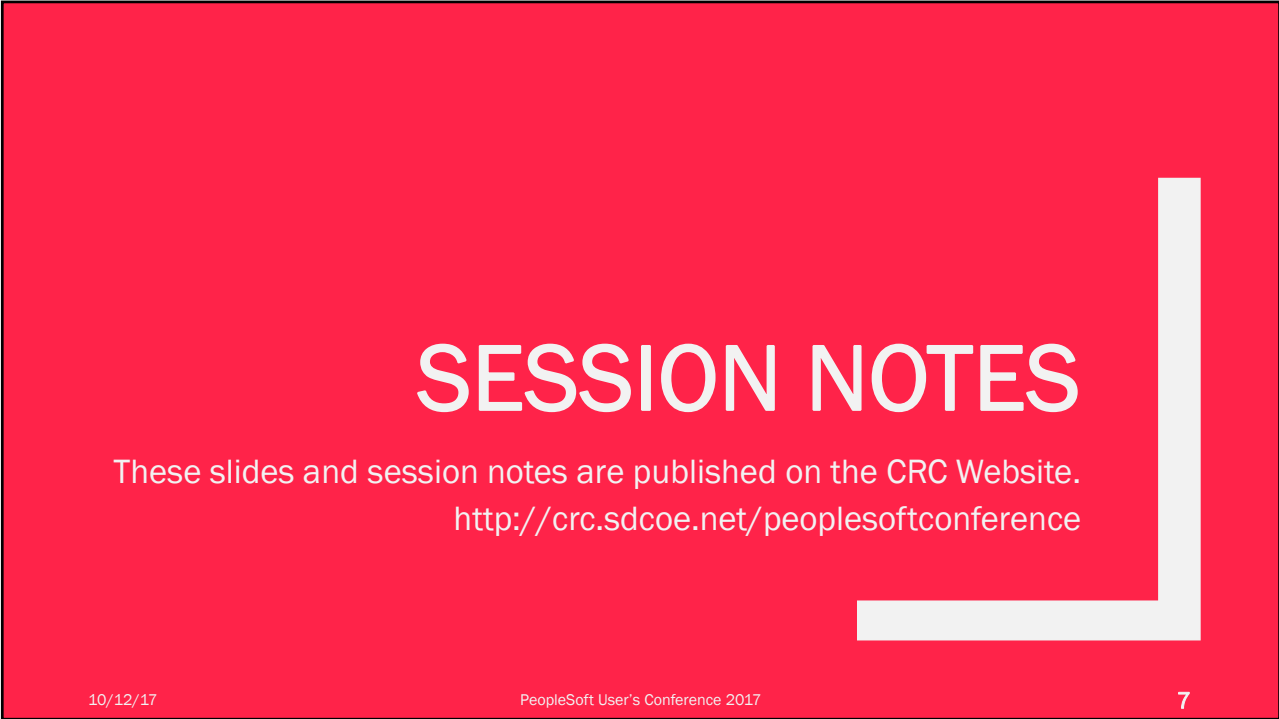
DISCUSSION (25 MIN)

What issues/challenges are you finding you have with your business process?
How are you working thru them?

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SESSION NOTES

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<http://crc.sdcoe.net/peoplesoftconference>

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