


HR/PAYROLL

Sondra Evans (Ramona)
Sharon Pacheco (Lemon Grove)

10/12/17

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Session Topics

- Welcome & Introductions (5 min)
- Guest Speaker Panel (20 min)
 - Communication = Success (Kathy Ferguson & Sherry Rogers, Oceanside) **SESSION D**
 - Action Forms, Communicate (Emma Puentes & Andrea Rivera, La Mesa-Spring Valley)
 - Communication, Checklists, Teamwork (Sharon Pacheco, Cristina Lopez & Melissa Northcutt, Lemon Grove)
- Discussion (30 min)
 - What has your organization implemented to ensure HR and Payroll are communicating?
 - Have organizations reviewed assignments between HR and Payroll and moved the work around for a better fit with PeopleSoft?
 - What challenges are you working through?
- Wrap up & Closing

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GUEST SPEAKERS (20 MIN)

SESSION D – Kathy Ferguson & Sherry Rogers, Oceanside
Emma Puentes & Andrea Rivera, La Mesa-Spring Valley
Sharon Pacheco, Cristina Lopez & Melissa Northcutt, Lemon Grove

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Communication = Success (Kathy Ferguson & Sherry Rogers, Oceanside) **SESSION D**

- Co-develop forms
 - Separation Form
 - Action Sheets
- HR & Payroll Units work together to determine “Who is more appropriate to do this?”
 - MCOPs are entered by Payroll
 - Terminations are handled by Payroll
- Ongoing communication, fostering the relationship
 - Phone calls, emails, joint meetings, share outs

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Action = Communicate (Emma Puentes & Andrea Rivera, La Mesa-Spring Valley)

- Co-developed and implemented a Personal Data Card (PDC) to communicate actions
 - Human Resources completes the card
 - Payroll completes the checks and balances
- Email tickler file of pending actions
- Same location fostering on going communication and interaction
 - Shout outs, desk chats, emails

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Keys to Success (Sharon Pacheco, Cristina Lopez, Melissa Northcutt, Lemon Grove)

- Communication
 - New processes between departments
 - Reassignment of Duties
 - Keeping everyone in the loop
 - Flexibility - who should be doing what and making adjustments willingly
- Co-developed checklists that work more efficiently with PeopleSoft
- Tickler file for changes, and Auditing for payroll
- Teamwork

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DISCUSSION (30 MIN)

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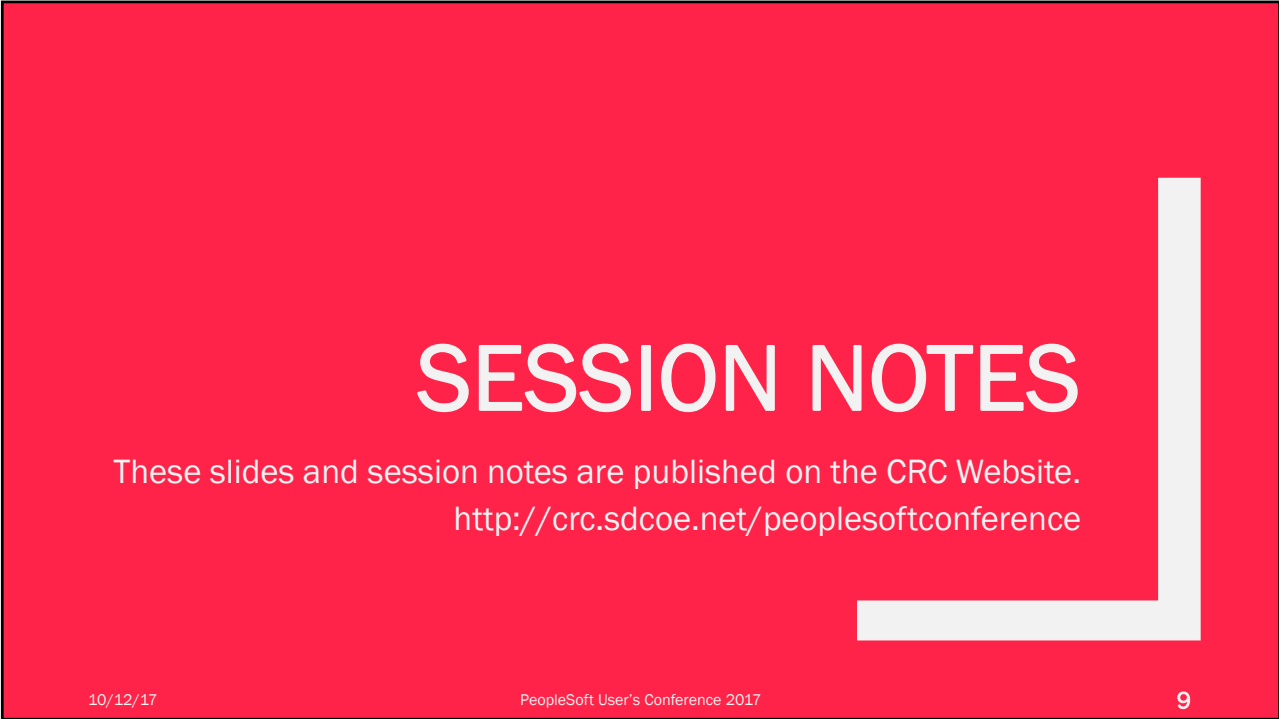
Discussion

- What has your organization implemented to ensure HR and Payroll are communicating?
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SESSION NOTES

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

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