HR Service Delivery

May 2016
HR Service Delivery is a multiyear initiative to improve the EASE, CONSISTENCY, and EFFECTIVENESS of HR at Ohio State.
The initial goals of HR Service Delivery are to

- Standardize the HR processes and HR roles within the university’s Service Centers
- Create a university-level onboarding program
Four Categories of Projects

1. Service Center alignment and operations support

2. Preboarding & onboarding (e.g. Creating the Onboarding Experience, New Employee Orientation, Common Start Date, etc.)

3. Tools, systems and data governance (e.g. case management system, standardized hiring templates in DocuSign, comprehensive tech roadmap, etc.)

4. Electronic personnel records
Service Center alignment and operations support

Specific deliverables and timelines for completion:

1. Standardized HR Service Center processes (December 2016)
2. Standardized HR Service Center roles (December 2016)
   
   Project managers: Jason Barnett (Advancement) and Kristi Pyke (Vet Med)

3. Centralized training & support for HR Service Centers (December 2016)
   
   Project manager: Brian Newcomb (OHR)
Preboarding and Onboarding

Specific deliverables and timelines for completion:
1. Common start date for new staff hires (October 2016)
2. Creating the onboarding experience, including new hire curriculum, managers onboarding toolkit, cross-boarding program and new hire portal/app (December 2016)
3. University-level new employee orientation (December 2016)
4. Technology equipment and access request template (December 2016)
5. New hire survey and manager focus groups (Already implemented, will be conducted quarterly)

Project Managers: Molly Driscoll (OHR), Natalie Wittmann (OSUWMC), Tracey Pawlowski (OHR), Laura Palko (OCIO)

(Deliverables dependent on resources/funding availability)
Tools, systems and data governance

**Specific deliverables and timelines for completion:**

1. Comprehensive HR technology plan (June 2016)
2. Institution-wide case management tool (December 2016)
   
   *Project Manager: Brian Newcomb (OHR)*
3. Defined guidelines for and clean-up of Position Management within PeopleSoft (December 2016)
   
   *Project Manager: Grant Allen (OHR)*
4. Staff transition dashboard (May 2016)
5. Standardized hiring forms in DocuSign (May 2016)
   
   *Project Managers: Allyse Degenhardt (OAA) and Kathy Baker (Arts and Sciences)*
Electronic Personnel Records

Specific deliverable and timeline for completion:
1. Electronic personnel records
   • Policy revisions, name/consistency of file documents, consistent procedure/method for official personnel records, funding recommendations (June 2016)
   • Draft plan and timeline being established to layout logistics for movement to OnBase; identification of who owns during/after implementation; communication/change strategy (Sept/Oct 2016)

*Project Managers: Andrea Gintert and Deb Miller (Student Life)*
Solution Vetting and Approval Process

- Core Teams
- Project Management Team
- Internal Audit
- Stakeholder Focus Groups
- HRSD Advisory Group
- HR Leadership Team
Program Management

Completed:
• Internal fact finding
• Cementing specific deliverables

Currently establishing and planning:
• Resource identification and approval
• Establishing baseline and ongoing metrics

Next up:
• Socializing solutions
• Operationalizing the solutions
Questions?

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Preboarding & Onboarding

May 2016
**Recommendations**

1. Conduct New Hire Survey
2. Rework name.number
3. Create Common Access and Equipment Form
4. Implement Common Start Dates for Staff Hires
5. Pilot One Stop Onboarding Day
6. Build Curriculum for New Hires
7. Utilize New Hire Portal
8. Enhance Online Supervisory Toolkit
9. New Hire App
10. Develop a Cross Boarding Program
11. Integrate Onboarding with Performance Management

**Work Plan – includes 6 projects**

**Preboarding Elements – 3 separate projects**

2. Rework name.number *(focus on obtaining a parking pass prior to first day, alternative solution identified)*
3. Create Common Access and Equipment Form *(renamed Technology Equipment and Access Request Template)*
4. Implement Common Start Dates for Staff Hires

**New Employee Orientation (NEO)**

5. Pilot One Stop Onboarding Day *(renamed NEO)*

**Creating the Onboarding Experience**

6. Build Curriculum for New Hires
8. Enhance Online Supervisory Toolkit *(renamed A Managers Role in Onboarding)*
10. Develop a Cross Boarding Program
11. Integrate Onboarding with Performance Management

**Technology solutions to implement the Onboarding Experience**

7. Utilize New Hire Portal
9. New Hire App

**Evaluation**

1. Conduct New Hire Survey *(renamed New Hire Survey and Manager Focus Groups)*
DocuSign Preboarding Paperwork

May 2016
Project Objectives

- Reduce the time needed to preboard hires by implementing use of DocuSign electronic envelopes.

- Create consistency in paperwork completed by new employees across OSU through standard hiring templates.

- Maintain use of only the most up-to-date versions of documents.

- Ensure all document accessibility and eSignature policy requirements are met.
Project Update

Standard hiring packets by hire type include:
- Staff/Faculty Single
- Graduate Associate Single
- Graduate Associate Bulk
- Student Non-GA Single
- Student Non-GA Bulk
- Graduate Fellow Bulk

Documentation updates:
- Hire Data Worksheet redesigned
- Ohio Ethics Code Acknowledgement now includes link
- Grad Fee Payroll Deduction updated
- SSA-1945 – now approved for digital signature!
- OPERS exemption & I-9 form require print & sign
Implementation Plan

- **May 31** – Finalize Hire Data Worksheet and develop packets
- **June 1** – June 16 – Pilot Staff/Faculty hire packet
- **June 16** – June 30 – Pilot remaining hire type packets
- **July 1** – Communication for OSU-wide implementation, including step-by-step instructions

Unit Preparation

- **DocuSign Access** – Sender and/or Author training needed to access hire packets
  - [http://go.osu.edu/buckeyelearn](http://go.osu.edu/buckeyelearn) – eSignature Sender & eSignature Author trainings available
  - Note: Sender **and** Author training is required to use the Bulk templates
Questions about DocuSign Preboarding Paperwork?

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Electronic Personnel Records

May 2016
Procedure/Policy:

- Current Policy revisions necessary
- File documents consistent by name and inclusion (or exclusion)
- Consistent procedure and method for official personnel records
- Draft language will be recommended (likely go through policy review process) by June 30.

Current State:

- No consistency on campus with variances regarding what’s in file, who has access, etc.
- SPHR survey and focus groups to determine change & communication strategy—results pending
Funding:
- Start-up money being considered to assist moving university onto OnBase
- Total costs, including hardware, licenses, outsourced vendors, etc. being considered in a cost proposal
- Goal: outcome determined by June 30.

Implementation:
- Draft plan and timeline being established to layout logistics for movement to OnBase.
- Part of funding proposal
- Identification of who owns during/after implementation
Questions?

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