Using Collaborative Language to Improve HR’s Technical Prowess

September 27, 2017
Presenters

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The City University of New York

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Deputy to the Senior University Director of HR Operations
The City University of New York
LEARNING OBJECTIVES

• Understand the changing business landscape and HR’s evolving role in implementing technology.
• Appreciate IT’s perspective to help develop lasting strategic partnerships.
• Learn how to articulate your needs in a way that makes sense to IT.
• Learn vital “tech terms” and basics on creating technical documentation.
THE CHANGING LANDSCAPE
Who is the driver of technology at your institution?

a) Human Resources (HR)
b) Information Technology (IT)
c) Both
d) Neither
THE NEW ROLE:
HR INFORMATION TECHNOLOGY SME
INCREASING EXPECTATIONS

• Do more with less
• Increase automation, efficiency, and productivity
• Use technology to leverage HR functions
• Replace aging systems
• Rebalance talent within HR
• Additional Responsibilities: HR Technology SME
• Strategic Partnership with IT
IMPROVING COMMUNICATION WITH IT
INFORMATION TECHNOLOGY

APPLICATIONS
SECURITY
INTERNET
DATABASE
SUPPORT
SYSTEMS
NETWORK
SERVERS
SOFTWARE DESIGN
COMPUTER
DEVELOPMENT
COMMUNICATION
Joanna Wisniewski
Assistant Director of Communications
Guttmann Community College
Question:

What are some of the biggest myths about working with IT?
Question:

Identify challenges you face when working with clients during IT projects?

“Lack of communication and miscommunications can often destroy an entire project. Web developers don't have a crystal ball to read their clients' minds: the importance of their feedback and involvement at each step of the project is vital.

Sometimes we don’t realize that we speak “different languages”, and technical terms can lead to confusion on what is being delivered. Making sure that everyone understands project goals and roles is vital to the success of a project.” - Gerlando
Youngren Ponnuraj
Assistant Director of Application Development
Computing and Information Services (CIS)
The City University of New York

Question:
Identify hurdles faced during the life cycle of an application or solution?

“The application development team faces many hurdles during the life cycle of an application or solution such as gaps and changes in requirements, misinterpretation of business processes, limitations of the product, resistance to a modified graphical user interface and process flow, and at times impractical expectations.

Over the years, we have successfully deployed several solutions to address HR’s needs. The key common factor in all our successes as been the collaboration between our team and the HR community.” - Youngren
Joanna Wisniewski
Assistant Director of Communications
Guttmann Community College
Question:

Final thoughts on what can clients do to make your jobs easier?
VIDEO - FINAL THOUGHTS
REMOVING THE FIREWALL

• Respect
• Cross-education
• Common Vocabulary
• Goal Alignment
• Shared Documentation
• Sustained conversations
• Defined roles
TAKING THE LEAD ROLE
HR TAKES THE LEAD

• SME in HR business processes
• HR Task – Learn technical language to gain credibility
• Lead the effort on:
  • Business process improvement and documentation
  • Type of software solution needed
  • Completing internal assessment
  • Assembling internal/external team
What is your level of comfort in writing a BRD or technical document for IT?

a) Very comfortable
b) Somewhat comfortable
c) Not comfortable
d) What the heck is a BRD?
e) C and D
COMPLETE INTERNAL ASSESSMENT

• Objectives = What are you trying to accomplish?
• Identify Requirements
• Other items to assess: Key users, timeline, budget, staffing (inside/outside of HR) and complete process documentation.
• Team up with IT
• Can you build internally versus buy?
• Vendor/Product research
REQUIREMENTS GATHERING BASICS

• Poorly defined software and system requirements = failure

• **BRD/BRS** (Business Requirement Document/ Business Requirement Specification Document)
  • Needs and goals, required processes, key operational factors

  • Describes what the system/software must do
• **Executive Summary** – High-level Overview
• **Scope** – Constraints, business process affected, and impact on stakeholders
• **Business Case**
• **Risk Analysis/CSF** (Critical Success Factors)
• **Current Process** (include flowcharts)
• **Future-State Process** (include flowcharts)
• **Timeline and Budget**
• **Terms, Acronyms, Abbreviations and Definitions**
• **Functional Requirements/Specifications** (can be included or separate)
• **Approver and team information**
FRD/FRS/FDD OVERVIEW

• Where business truly aligns with IT
• Documents the operations and activities (functions) that a system/software must be able to perform to solve requirements presented.
  • “System shall” statements
  • System appearance and behavior
  • Use Cases/User Stories
• Detailed descriptions should include:
  • Type of data to be entered
  • Identify where data is located in your HR Information System (HRIS)
Share requirements and get input from IT
Considerations – existing systems, capabilities, costs, security
Build versus buy terms to know:
- **Bolt-On/Plug-and-play/Add-on** – software easily integrated into larger system
- **Interface** – where two independent systems meet and enable communication
- **Cloud** – type if internet-based computing
- **SSO (Single Sign-On)** – users enter one set of credentials
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**About HR Tech**

"Embracing an HR Tech strategy is one key to success in organizations that want to attract and retain talent. With growing emphasis on topics like employer branding, predictive analytics, community management, social, mobile and social, comprehensive solutions are required to manage it all. The recent fueled intelligence of HRIS, HRMS and HCM solutions in today's innovative landscape allow HR leaders to create custom programs that measure employee performance and deliver tracking, reporting and insights that can translate to solid business value."

-Meghan M. Biro, TalentCulture
VENDOR CONSIDERATIONS

• Research vendor in the marketplace
• Data and Security Access
• Compatibility
• Service-Level Agreement (SLA)
• Statement of Work (SOW)
• Accessibility Requirements and System Access
• Reporting and Customizations
• Application Security Testing (AST)
WEB DESIGN TERMS TO KNOW

- **Content Management System (CMS)** – controls content on website (Examples: WordPress, Drupal)
- **Site Map** – layout of pages and content within a website
- **Information Architecture (IA)** – design and organization of content
- **Coding (CSS, HTML, JavaScript)**
- **Responsive design** – End-user view changes with device used
- **ALT Attribute** – Alternate text for overall accessibility
- **Uniform Resource Locator (URL)** – web address
- **301 redirect** – Directs you to a new website/webpage
- **Site analytics** – analysis of web data to optimize usage
Welcome to the City University of New York. The decision to move to New York City can be a complex process, especially for those who are making the big move to New York City. Please visit the CUNY Work/Life Program website, login & password CUNY, or contact a specialist 24/7 toll-free at (888) 993-7503.

CUNY Work/Life Program specialist can assist you with many different types of relocation challenges. Please visit the CUNY Work/Life Program website, login & password CUNY, or contact a specialist 24/7 toll-free at (888) 993-7503.

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HR AND IT COLLABORATION @ CUNY
CUNY NEW EMPLOYEE ONBOARDING

The employee new hire process has three steps. The first step happens here, online. Onboarding Step No. 1 will assist you with the employment forms that are required to get you started in your new job. New hire forms are based on your category of staff (please refer to your offer letter). Forms must be printed and signed and brought with you on or before your first day of work. Each form has instructions on how to complete it. At Onboarding Step No. 2, you’ll be advised about CUNY HR policies and required employee training. Finally, at Onboarding Step No. 3 you’ll be able to review information about your benefits options.

The next step of the onboarding process takes place on or before your first day of work. On that day, you’ll report to your campus where you will meet with a member of the CUNY Human Resources team for a comprehensive orientation session. Note: you will need to bring the requisite forms of identification in order to be processed.

Following your orientation and benefits information session, you will be advised which benefits forms must be returned to the Office of Human Resources within 30 days of your start date. Graduate Assistants will submit their health insurance applications to NYSHIP Coordinator, Scott Voorhees.

Now let’s get started!

Quick Links
- Campus HR Contacts
- Additional New Employee FAQ’s
- Information and Instructions for CUNY New Employee Print and Sign Forms

- Classified Civil Service (Full-Time)
- Classified Civil Service (Part-Time) - Including College Assistants
- Classified Managerial
- Classified Civil Service Titles - Temporary
- Executive Compensation Plan (ECP)
# Project Summary
This project intends to redesign CUNY’s Onboarding process to eliminate paper, ensure compliance, and simplify the process by converting all new hire documents to workflow enabled eForms, including I-9, W-4, direct deposit, personal data, confidentiality agreements, employee acknowledgments, and more. With rule-driven workflow, approval routing, and direct updates to CUNYfirst, this will simplify and standardize process management.

## Integrated New-Employee Onboarding Objectives
- Deliver an interactive portal-based solution that can be configured to automate CUNY’s unique processes and requirements for new hires, house multi media and interface with CUNYfirst.
- Configure conditional onboarding requirements based on business unit, department, job, or other attributes.
- Easy navigation between forms, automatically saving work-in-progress and configure rules to enforce prerequisite tasks are completed before others can begin.
- Enable hires to enter form data once, eliminating redundant data entry and reducing errors with direct updates to CUNYfirst.
- Simplify maintenance and minimize coding with seamless integration into delivered CUNYfirst components.
- Provide single point of entry for provisioning

## Key Business Drivers
- Standardize the new-hire onboarding process across the University
- Improve administrative service levels
- Reduce Costs
- Ensure Compliance Requirements
- Improve New Hire’s Time-to-Productivity

## Critical Success Factors (CSF)
CSF’s that are especially relevant to the success of the Onboarding enhancement project are:
- Availability of knowledgeable business functional SMEs during all phases
- Clear objectives, requirements, and deliverables
- Rapid issue resolution
- Clear and appropriately-distributed communications
- Tight change management and control processes
- Complete, accurate testing and data validation
- Develop a standard pre-implementation checklist
- CUNY-wide acceptance and adoption of new onboarding forms and procedures
- Successful socialization of all process changes encompassed inside and outside of CUNYfirst
- Successful training and full acceptance of enhancements related to TAM as well as the onboarding solution implemented
New-Employee Onboarding Overview

Current Business Process

After acceptance of a job offer, HR sends new hires a link to the “New Employee Resource Center” (NERC) website to complete new hire paperwork in preparation for orientation with HR. The NERC provides role-based navigation based on the new hire’s category of staff.

New hires begin by watching a welcome video from Vice Chancellor Waters and follow a three-step process to complete required new-hire paperwork, training, and learn about all CUNY benefit options. New hires then complete, print and sign all required paperwork for orientation with Human Resources. After orientation is complete, HR staff inputs relevant employee information into CUNYfirst and completes the hiring process manually.

Proposed Business Process

An interactive portal-based solution that is configurable to automate CUNY’s unique processes and requirements for new hires, house multi-media, and interface with CUNYfirst.

HR Process Change: After acceptance of a job offer, HR will send new hires a link with credentials and login instructions to the New-Employee Portal. Once the candidate logs-on the New-Employee Portal, the candidate will view a welcome video and see an onboarding checklist to complete. It will list the various forms by name, provide forms descriptions and instructions (where appropriate), and indicate form disposition. eforms will be based on category of staff and grouped into one of two categories. They are:

1. eForms: Completed and submitted online with streamlined CUNYfirst data integration
2. Printed New-Hire Forms: Submitted with two forms of valid ID during orientation with CUNY HR

New hires will experience easy navigation between forms, automatically saving work-in-progress using configured rules to enforce prerequisite tasks are completed before others can begin.

Welcome Video and Portal View: The welcome video must have an electronic acknowledgement that the employee reviewed the video.
Onboarding Forms Inventory

Required Forms:
- Personal Data Form
- Direct Deposit
- W-4
- IT-2104
- I-9 – Employment Eligibility
- Statement of Citizenship
- Emergency Evacuation Assistance
- Emergency Contact Information
- Amended Constitutional Oath
- Veteran Status
- Certification prior Public Service / Pension – Classified Titles Only
- License / Professional Registration Verification – Classified Titles Only
- Report on External Employment – Classified Titles Only

Voluntary Forms:
- Voluntary Self-Identification Form for Employees
- Voluntary Self-Identification Form of Disability

Policies and Information:
- Adjunct Fact Sheet – Adjunct Titles Only
- IT Security Information
- CUNY Employee Policy Checklist
- Code of Practice – Instructional (Teaching and Non-Teaching) Only
- ECP Terms and Conditions - ECP Only
- Information Concerning Union Membership and Dues for PSC – Instructional (Teaching and Non-Teaching) Only

Onboarding Checklist: The checklist should provide status of forms and provide overdue notifications to the new employee.
Task Status Tracking: During the onboarding process, measure key performance indicators (KPIs) on tasks for internal and external stakeholders to ensure important paperwork is completed and identify areas that may benefit from process improvement.

High-level Proposed Future-State Overview
Below are the onboarding candidate to employee lifecycle summary steps.

1. In TAM, HR sets applicant disposition to "Prepare to Hire" and sends candidate an email with login credentials to the New-Employee Portal.
2. In the New-Employee Portal, the Candidate is directed to:
   a. Watch Welcome video from Vice Chancellor Waters with electronic acknowledgement.
   b. Complete all required forms, configured with prerequisite tasks.
   c. Review and acknowledge all required policies and information.
   d. HR receives workflow notification that candidate has completed tasks.
3. In the Onboarding system, HR reviews the Onboarding Checklist to manage and track the submission of the candidate’s eforms.
   a. If any of the eforms are incomplete or inaccurate, HR will set form(s) disposition back to "In-progress", notify the candidate and request resubmission.
4. After review and approval by HR, candidate disposition is set to "Ready to Hire"
5. In the New-Employee Portal, the Candidate prints the ‘Printed Onboarding Forms’.
6. Non-System Process: During the New Hire orientation, the candidate fills-out the printed onboarding forms then submits them for HR for review.
   a. After validating the Printed Onboarding Forms, HR updates disposition to ‘Complete’ or requests resubmission.
7. In TAM, HR is now ready to complete the "Ready to Hire" process.
## Onboarding Technology Requirements

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<th>ID</th>
<th>Major Category</th>
<th>Minor Category</th>
<th>Requirements</th>
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<td>1</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Provides workflow for job offer approvals based on CUNY-defined processes with the ability to modify data within the approval process.</td>
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<tr>
<td>2</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for CUNY to completely customize Offer letters.</td>
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<tr>
<td>3</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for candidates to electronically accept an offer, using an electronic signature.</td>
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<td>4</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for candidates to electronically complete pre-hire paperwork such as Background Authorization.</td>
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<td>5</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability to integrate with third-party screening services including criminal background check and drug testing.</td>
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<tr>
<td>6</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides a system login for new hires when job offer is electronically accepted and approved with completed paperwork.</td>
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<tr>
<td>7</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability for New Hire to complete all required paperwork online prior to first day.</td>
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<td>8</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to track new hire progress with set disposition codes: Not Started, In Progress, Submitted and Complete.</td>
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<td>9</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to provide an interactive portal with wizard-based checklist of activities that employees need to perform to complete the Onboarding process (i.e. verify address, update EEO information, submit tax forms).</td>
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<td>10</td>
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<td>Ability for electronic signature and acknowledgement of CUNY Policies.</td>
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<td>11</td>
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<td>Onboarding</td>
<td>Ability to house multi-media.</td>
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<td>12</td>
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<td>Onboarding</td>
<td>Ability to enter new hire with a future start date.</td>
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<td>13</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides Onboarding workflows that will automatically notify required departments, such as IT and payroll, of pending new hires.</td>
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<td>14</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides ability to configure onboarding workflows based on employee type: Instructional (Teaching and Non-Teaching) F/T and P/T, Subs/Interims/Acting, ECP, Classified Managerial, Classified Civil Service (F/T and P/T).</td>
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<td>15</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>On hire date, candidate system security reflects active employee. (With a Welcome message)</td>
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<td>17</td>
<td>HR Recruiting</td>
<td>New Hire Process</td>
<td>Ability to process rehires through the recruitment application with the rehire record pre-populated with existing data.</td>
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<td>New Hire Process</td>
<td>Ability to process internal promotions directly from the recruitment application.</td>
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<td>New Hire Process</td>
<td>Provides ability to perform a mass hire from an excel spreadsheet.</td>
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<td>Reporting</td>
<td>Provides robust ad-hoc reporting tool that includes all fields that exist in the database.</td>
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<td>21</td>
<td>HR Recruiting</td>
<td>Reporting</td>
<td>Provides a built in Audit trail.</td>
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## Fit/Gap Analysis of Onboarding Technology Requirements

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<th>ID</th>
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<th>Effort</th>
<th>Comments</th>
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<td>1</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Provides workflow for job offer approvals based on CUNY-defined processes with the ability to modify data within the approval process –</td>
<td>Y</td>
<td>Complex</td>
<td>88</td>
<td>This functionality is not available in activity guides, we need to create a regular workflow.</td>
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<td>2</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides a system login for new hires when job offer is electronically accepted and approved with completed paperwork</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for CUNY to completely customize offer letters –</td>
<td>Y</td>
<td>High</td>
<td>26</td>
<td></td>
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<td>4</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for candidates to electronically accept an offer, using an electronic signature.</td>
<td>Y</td>
<td>Moderate</td>
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<tr>
<td>5</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability for candidates to electronically complete pre-hire paperwork such as Background Authorization,</td>
<td>Y</td>
<td>Low</td>
<td>10</td>
<td></td>
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<tr>
<td>6</td>
<td>HR Recruiting</td>
<td>Offer Process</td>
<td>Ability to integrate with 3rd-party screening services including criminal background check and drug testing</td>
<td>Y</td>
<td>Complex</td>
<td>68</td>
<td>We need to access external URLs for these action items. Involves integration with third-party applications.</td>
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<tr>
<td>7</td>
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<td>Onboarding</td>
<td>Ability for New Hire to complete all required paperwork online prior to first day</td>
<td>Y</td>
<td></td>
<td></td>
<td>Item ID 9 (below) covers this</td>
</tr>
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<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to track new hire progress with set disposition codes: Not Started, In-Progress, Submitted and Complete</td>
<td>Y</td>
<td>Low</td>
<td>3</td>
<td>Fit for certain checklist items, remaining need custom pages (14 items) - amended constitution oath, emergency evacuation assistance, IT-2186, voluntary forms (2), certification for professional and community, statement of citizenship, IT security information, code of practice, GCP terms and conditions, information concerning union membership, report on external employment, adjunct faculty sheet</td>
</tr>
<tr>
<td>9</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to provide an interactive portal with wizard-based checklist of activities that employees need to perform to complete the Onboarding process (i.e., verify address, update EID information, submit tax forms)</td>
<td>Y</td>
<td>Complex</td>
<td>174</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability for electronic signature and acknowledgement of CUNY Policies</td>
<td>Y</td>
<td>Low</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to house multimedia</td>
<td>Y</td>
<td>High</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Ability to enter new hire with a future start date</td>
<td>Y</td>
<td></td>
<td></td>
<td>Question for OHRM</td>
</tr>
<tr>
<td>13</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides Onboarding workflows that will automatically notify required departments, such as IT and payroll, of pending new hires</td>
<td>Y</td>
<td>High</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>HR Recruiting</td>
<td>Onboarding</td>
<td>Provides ability to configure onboarding workflows based on employee type - Instructional (Teaching and Non-Teaching) (FT and P/T), Subs/Inters/Acting, GCP, Classified Managerial, Classified Civil Service (FT and P/T) –</td>
<td>Y</td>
<td>Low</td>
<td>3</td>
<td>Activity guides/checklists are assigned to users or roles. We can assign certain checklists only to specific roles depending on the requirement</td>
</tr>
</tbody>
</table>
• What do you want to accomplish?
• Complete internal assessment
• **Engage IT - Tell them what you’re thinking about**
• Document requirements
• Create system wish list
• Vendor/product or internal research
• **Engage IT – Share information and get feedback**
• Flush out documentation – be as detailed as possible
• Take the lead role
• **Maintain communication with IT and be flexible**
POLLING QUESTION #3

What is your level of comfort in writing a BRD or technical document for IT?

a) Very comfortable
b) Somewhat comfortable
c) Not comfortable
d) What the heck is a BRD?
e) C and D
Don’t forget to submit your questions to our presenters.

**How?** Click on the Q & A tab at the top of the presentation and select *Ask New Question*.

Thank you for joining us today!
Thank You!

“Using Collaborative Language to Improve HR’s Technical Prowess”

September 27, 2017

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