

# **ABT Program High Level Business Design (HLBD)**

## **Recruit/Hire Business Process**

### **Business Process Description**

The recruiting and hiring process refers to the steps to identify, screen, select and hire people to fill a job vacancy within an organization.

The recruit/hire process steps addressed during HLBD using PeopleSoft functionality included: managing the approval to hire process; creating and posting job announcements; demonstrating how external and internal applicants apply for open positions using the internet or intranet; showing how PeopleSoft can help manage applicant information; demonstrating how PeopleSoft can help screen applicants and schedule them for interviews; showing how PeopleSoft supports evaluation of interviewed candidates; and how PeopleSoft facilitates the hiring process.

The current county recruiting and hiring environment is challenging. Over 80% of the agencies use a paper job application process; several agencies follow different recruitment and hiring processes; there is inadequate access to recruitment and outreach data for county recruiters; several agencies use third-party recruiting systems; and most agencies need to coordinate their recruiting and hiring activities with the county's Reassignment and Layoff/Recall program. These challenges (and others) make it difficult for the county to attract and hire well qualified candidates in a timely manner.

### **Recommended Business Process Design**

The recommended design approach is that PeopleSoft HCM will be the system of record for all county recruiting and hiring processes. The ABT Program will fully implement the Candidate Gateway, Talent Acquisition Manager and eCompensation modules of PeopleSoft HCM. PeopleSoft HCM ultimately will replace all third party vendor recruiting software. The ABT Program recommends that the implementation of the recruiting and hiring functionality be phased in, agency by agency. During implementation, the ABT Program will work with each agency to ensure that their essential business needs are accommodated by PeopleSoft. If required, ABT will work with each agency to modify their business process to achieve best practices as incorporated in PeopleSoft. ABT will work with agency staff to train them on the new business process and how to complete recruiting and hiring activities using PeopleSoft HCM.

The major goals of the design approach are:

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- To automate the recruiting and hiring processes as much as possible and still allow for a paper recruiting and hiring process.
- To standardize job classifications, job descriptions, job profiles and other job specifications and to have the data available in PeopleSoft for use by recruiters and employment staff.
- Facilitate the approval process to recruit and hire for vacant positions.
- Facilitate the process for both internal and external applicants to apply for jobs via the intranet/internet.
- Facilitate the process for posting King County jobs on Career websites (Monster, Career builders, etc.).

### **Assumptions**

- All county agencies will use PeopleSoft HCM as the system of record for recruiting and hiring activities.
- PeopleSoft work flow will be configured to ensure county recruiting and hiring processes are consistent with the county workforce management plan and civil service rules.
- Each job description is associated with a set of competencies (knowledge, skills and abilities).
- PeopleSoft will be configured to meet the unique needs of the Sheriff's Office, the Department of Adult and Juvenile Detention and the Department of Public Health as well as the other county agencies.
- The paper recruiting and hiring process will still be available.

### **Modules supporting process:**

- Candidate Gateway (currently not in production)
- Talent Acquisition Manager
- e-Compensation

### **HLBD Requirements and Design Session Summary**

- **SEE SEPARATE DOCUMENTS – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>**

### **Functional Gaps**

- PeopleSoft functionality does not address the county's "free form" applications questions requirement.

### **Issues**

- Who owns the recruitment business process?

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- Need to clearly define which recruiting and hiring tasks will be performed centrally.
- Who owns the recruitment and hiring modules?
- Who will provide the support and training for use of this functionality?
- Not all applicants have access to computers or the Internet which may result in a loss of qualified candidates if the county does not maintain a paper process.
- It will take a huge effort to document current job competencies i.e. knowledge, skills and abilities and enter them into PeopleSoft.
- Who will maintain the job description information tables?

### Organizational Impacts

- PeopleSoft functionality will replace most of the manual recruiting and hiring processes currently employed throughout King County.
- PeopleSoft functionality will ultimately replace NeoGov in HRD, the Sherriff’s Office and the Public Health Department.
- Training will be required for staff involved in recruiting and hiring activities.
- The opportunity to share applicant information with other county recruiters will be greatly enhanced.
- Additional trained resources will be required to support the recruit/hire system functionality.

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Develop position KSA’s	HRD	Huge body of work to develop, enter and maintain in the system
Develop position job descriptions	HRD/Agency	Need to decide who has this responsibility
Approve to fill vacancies	HRD/Budget Office/Agency	
Develop job postings	Agency	
Screen candidates	Agency	
Interview candidates	Agency	
Select a candidate to hire and make a job offer	Agency	
Initiate and coordinate the hiring process for new hires	Agency/Benefits	

# Employee Performance Management Business Process

## Business Process Description

The employee performance management process refers to the steps to establish measurable goals and codes of conduct for all employees; assess achievement of these expectations; and then use this information to improve employee performance through coaching, compensation, training, employee development, and other means within an organization.

The employee performance management process steps addressed during HLBD using PeopleSoft functionality included: managing the employee appraisal process; creating employee performance documents; demonstrating how employees can complete self-evaluations; demonstrating how supervisors can review and approve the employee self-evaluations and complete the employee's performance appraisal; and how PeopleSoft facilitates the employee performance management process including running reports.

The current County employee performance management environment is challenging. There is no standard process in place to ensure that all County employees are evaluated on their job performance. Performance appraisals are not generally completed for represented employees. Not all non-represented employees have their performance consistently evaluated. For many County agencies, the performance appraisal and merit pay systems for non-represented employees are linked. For some agencies, the supervisor to employee ratio is enormous. Supervisors do not have effective tools to realize employee performance improvements. These challenges (and others) make it difficult for the County to evaluate all employees consistently and in a timely manner.

## Recommended Business Process Design

Recommend that the county purchase the PeopleSoft ePerformance module and implement the functionality based on the business rules defined by the Employee Performance and Accountability Program and Superior Court. During implementation, the ABT Program will work with each agency to ensure that their essential business needs are accommodated by PeopleSoft. ; If required, ABT will work with each agency to modify their business process to achieve best practices as incorporated in PeopleSoft and the EPAS project; ABT will work with the EPAS project to train agency staff on the new business process.

## Assumptions

- The Employee Performance and Accountability Systems Program will implement a paper employee performance process prior to implementation of the PeopleSoft performance management functionality.

### Modules supporting process:

- ePerformance (county does not currently own this module)
- eProfile

### HLBD Requirements and Design Session Summary

- **SEE SEPARATE DOCUMENTS – Session Power Point Presentations, Session Notes, and Session Background Documents**; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### Functional Gaps

- None identified

### Issues

- Separately elected Agencies had different requirements.
- Who owns the setup tables for ePerformance and who is responsible for supporting them?
- It will take a huge effort to document current job competencies i.e. knowledge, skills and abilities and enter them into PeopleSoft.

### Organizational Impacts

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Maintain Set-up tables	?????????	
Developing Goals	Agency/Manager/Employee	
Developing Performance Measures	Agency/Manager/Employee	
Self Evaluation	Employee	
Peer Evaluation	Employee Peers	
Evaluation	Manager	
Review and Approve Evaluation	Agency/Manager/ Employee	

# Leave Administration Business Process

## Business Process Description

The leave administration process refers to the activities to manage an organization's employee leave policies and procedures, including the Family and Medical Leave programs, sick and vacation leave, executive and compensatory leave, state leave requirements and other time off programs.

The leave administration process steps addressed during HLBD using PeopleSoft functionality (Absence Management) included: managing the leave administration process; showing what types of leaves employees are eligible for; demonstrating how employees can request a leave online; demonstrating how supervisors can review and approve employee leave requests; demonstrating how employees can review their leave accrual balances; and how PeopleSoft facilitates the leave administration process. We learned that the Absence Management module is highly configurable and is flexible enough to meet the county's requirements

The current County leave administration environment is challenging. Employees initiate leave requests and leave status changes through paper forms; employees do not always notify Human Resources (HR) in a timely manner when they experience a change in their leave status and because of this, the County may continue to pay benefits it is not legally required to pay; there is no penalty assessed to the employee who fails to provide proper and timely notification; employees do not have easy access to their leave information; departments do not have easy access to leave data; and several agencies handle their own leave administration process. These challenges (and others) make it difficult for the County to accurately maintain and monitor leave information and data for all employees.

## Recommended Business Process Design

- We recommend that the Leave Administration business process be improved in advance of implementing this functionality.
- We recommend that the ABT Program collaborate with the Leaves Steering Committee to implement best practices for the County.
- Once the business process is improved we recommend implementation of the Absence Management module of PeopleSoft HCM.

## Assumptions

### Modules supporting process:

- Absence Management

## HLBD Requirements and Design Session Summary

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### Functional Gaps

- None identified

### Issues

- Conflicting county leave administration policies and practices.
- Ownership of the Leave Administration process is not clear.
- Central questions to be answered include: who owns this process and should it be administered centrally?

### Organizational Impacts

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Administer Family Leave Plans	Agency/HRD/FBOD	
Administer Medical Leaves	FBOD/HRD/Agency	
Leave Accruals	FBOD/HRD	
Leave Approval	Agency	
Compensatory Time	Agency	
Donated Leaves	Agency/FBOD	

# Time and Labor Business Process

## Business Process Description

The time and labor process refers to the activities required to collect employee time worked during a given week or pay period and enter that information into a time capture system, such as PeopleSoft.

The time and labor process steps addressed during HLBD using PeopleSoft functionality included: managing the time and labor process; demonstrating how employees can report their time worked or exceptions online; demonstrating how reported times worked can be corrected; demonstrating how supervisors can review exceptions and approve an employee's reported time; and how PeopleSoft facilitates the time and labor process. We explored how PS Time and Labor can support multiple work schedules and that the module is highly configurable and can meet the time capture and schedule requirements for many county agencies. We also reviewed how PeopleSoft can be interfaced to other third-party time capture systems.

The current County time and labor environment is challenging. Within the County there are at least fourteen different side systems used to capture and report employee time. The differing methods used by the agencies to capture time have resulted in numerous time capture processes. The time submission schedules for employees across County agencies vary depending on the time capture system used. These challenges (and others) make it difficult for the County to have a standardized and efficient time and labor business process.

## Recommended Business Process Design

- We recommend that PeopleSoft Time and Labor be the system of record for all reported employee time.
- We recommend that PeopleSoft Time and Labor interface to the custom Labor Distribution module and the Oracle General Ledger.
- We recommend that we interface existing specialized time capture systems that are meeting business needs in addition to time capture (HATSUS, RMS, Faster, etc.) to PeopleSoft Time and Labor.
- We recommend identifying a standard time capture system for agencies that PeopleSoft time and labor will not meet their business needs. The standard system will interface to PeopleSoft time and Labor.
- During implementation, the ABT Program will work with each agency to ensure that their essential business needs are accommodated by PeopleSoft. ; If required, ABT will work with each agency to modify their business process to achieve best practices as incorporated in PeopleSoft. ; ABT will work with agency staff to train them on the new business process and how to complete time capture tasks activities using PeopleSoft HCM.

## **Assumptions**

- Existing time capture systems that are meeting business needs in addition to time capture and whose functionality can not be met by PeopleSoft will be interfaced to PeopleSoft Time and Labor.
- POL will be replaced by PeopleSoft Time and Labor or a standard time capture system identified by the ABT program.
- All county work weeks will have a common payday and pay period end, i.e. every other Thursday (payday) and every other Friday (pay period end).

## **Modules supporting process:**

- Time and Labor

## **HLBD Requirements and Design Session Summary**

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

## **Functional Gaps**

- None identified

## **Issues**

- Several Agencies currently hold overtime earned by employees until the next payday;
- Side systems will need to be modified to handle bi-weekly payroll cycle.
- As part of the interface to the Oracle General Ledger will need to pass accounting codes to PeopleSoft Time and Labor.

## **Organizational Impacts**

- Some existing side systems will be replaced by PeopleSoft Time and Labor functionality.
- Agency staff new to PeopleSoft Time and Labor will need to be trained on functionality.

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Report Time	Employees	
Collecting Time	Agency	
Correcting Time	Agency	
Approving Time	Agency	
Labor Distribution	Agency/FBOD	

# Training Administration Business Process

## Business Process Description

The training administration process refers to the steps to develop and administer training opportunities for an organization's employees, maintain regulatory education compliance and track the completion of certification and educational programs. Coordinate training activities with performance management activities to improve employee performance.

The training administration process steps addressed during HLBD using PeopleSoft functionality included: administering and managing the employee training process; demonstrating how employees can enroll for training online; demonstrating how supervisors can review and approve employee training requests; demonstrating how employees can review what training they have taken; setting up competency and license/certification tables; demonstrating how employees can edit and update their competencies (knowledge, skills and abilities attained) and accomplishments (licenses and certifications etc.); and how PeopleSoft facilitates the training administration process including running reports. We also explored the Enterprise Learning Management (ELM) functionality and discovered that few organizations have implemented the ELM module and that the license cost for the module is very expensive.

The current County training administration environment is challenging. Planning for training and employee development is done annually or quarterly by some agencies or not at all by other agencies. There is no centralized resource list of approved equivalency training for employees to access. There is a lack of knowledge about what other departments are procuring, so departments are unable to attach to other's training to reduce costs. Training history is lost when an employee moves to a new department. There is no measurement of effectiveness of the learning process. Training approvals are not always based on job needs. Mandatory employee training completion is not tied to a supervisor's performance review. These challenges (and others) make it difficult for the County to train and develop its employees equitably, consistently, cost effectively and in a timely manner.

## Recommended Business Process Design

We explored the Enterprise Learning Management (ELM) functionality and do not recommend implementing this product at this time. We recommend that ABT work with HRD Training Administration to review and evaluate the current configuration of PeopleSoft eDevelopment to determine if business operations can be improved and if so implement those configuration changes.

## Assumptions

### Modules supporting process:

- Enterprise Learning Management (county does not own this product)
- eDevelopment

## HLBD Requirements and Design Session Summary

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### Functional Gaps

- None identified

### Issues

### Organizational Impacts

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Identify Training Needs	Agency	
Procure Training	Agency/HRD	
Schedule Training	Agency/HRD	
Tracking and documenting Training Completed/Certifications	Agency/HRD	

# Position Management Business Process

## Business Process Description

Position management is defined as a carefully designed position structure which blends the skills and assignments of employees with the goal of successfully carrying out the County's multiple mandates, missions, operations, and programs. Sound position management reflects a logical balance between employees needed to carry out the major functions of the county and those needed to provide adequate support; between professional employees and technicians; between fully trained employees and trainees; and between supervisors and staff. Human Resources (HR) uses position management for staffing purposes. Budget and Finance uses position management for budgeting and accounting purposes.

The position management functionality within PeopleSoft HCM is used to establish the hierarchical structure of approved positions within an organization. Other functionality (modules) within PeopleSoft HCM assumes that the organization uses position management to define its positions and related position attributes; such as job code, department, reporting relationships, job skills, etc. Utilization of position management functionality and enforcing strong business rules will allow the county to meet many business needs such as managing multiple organizational hierarchies' structures (HR, Payroll, Accounting, and Budgeting); Reporting; Succession Planning; Performance Management; Employee Time Approval; Recruiting and ease HR data entry. The position management process steps addressed during HLBD using PeopleSoft functionality included: managing the position management process; demonstrating how to update the Department Table; creating a new position; making change to a position; demonstrating how positions can be dual slotted; demonstrating how to create a Department Budget Table; demonstrating how to create and maintain succession and career plans; and demonstrating how to run reports and queries.

The current County position management environment is challenging. There is no central system that plans, budgets, and administers the County's workforce as a whole. Departments/agencies currently on PeopleSoft do not use the PeopleSoft position management functionality. The current PeopleSoft system configuration does not reflect the County's HR organization structure, reporting relationships or job skills. PeopleSoft "Job Code" foundation tables are not standardized. Departments/agencies using the MSA payroll system perform a one-to-one match of positions to employees on a semi-annual basis. These challenges among others make it difficult for the county to efficiently manage its positions and to take full advantage of other PeopleSoft functionality.

## Recommended Business Process Design

The recommended design for position management is to implement the PeopleSoft position management functionality with "Partial position management" enabled and to develop strong business rules to ensure organizational needs are met. PeopleSoft partial position management functionality allows positions to be established for some slots in the organization, typically by group, level, classification or some other criteria. Employees who fill the positions could then optionally be placed in positions by HR staff. This allows the power of position management to be utilized for some employees but not forcing the entire organization to utilize position management.

Based on the consensus that was achieved during the HLBP work, we also recommend that the Human Resources Division (HRD) be the process owner for position management. We further recommend the HRD work with the ABT Program, Budget Office and Finance Management to develop the strong business rules cited above. The business rules must include steps that will facilitate the position management business requirements are met. Those requirements include managing multiple organizational hierarchies' structures (HR, Payroll, Accounting, Budgeting); position control activities; reporting; performance management; time approval; succession planning; recruiting; ease of HR data entry. We further recommend that we implement the partial position functionality in a phased approach, agency by agency. ABT will work with each agency to ensure their essential business needs are accommodated by PeopleSoft, work to modify their business processes to achieve best practices as incorporated in PeopleSoft; ABT will work with agency staff to train them on the new business process and how to perform position management activities using PeopleSoft.

### **Assumptions**

- All County Agencies will use Position Management

### **Modules supporting process:**

- Enterprise Human Resources

### **HLBD Requirements and Design Session Summary**

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### **Functional Gaps**

- None identified

### **Issues**

How will position management will be implemented: Every employee? All braches of the government?

Need to develop clear business rules and communicate to County agencies.

Changes required to the Foundation Tables of PeopleSoft 8.9 to implement Position Management functionality

### **Organizational Impacts**

- PeopleSoft functionality will replace most of the manual position management processes currently employed in King County.

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- Training will be required for staff involved in position management activities.
- Additional trained resources will be required to support the Position Management system functionality.

**Roles and Responsibility Impacts**

<b>Major Tasks</b>	<b>Who</b>	<b>Comments (Impacts)</b>
Create Positions	Agency/Budget/HRD	
Monitor Positions – FTE & Budget	Agency/Budget	
Fill Positions	Agency	
Manage Positions	Agency	

# Payroll Administration Business Process

## Business Process Description

The payroll administration process refers to the steps to collect and process employee time worked; make appropriate deductions from an employee's pay; pay employees; report payroll information to federal and state agencies; and provide payroll information to other departments such as Accounting, Benefits, Budget and HR within an organization.

The current county payroll administration environment is challenging. The county operates on two different payroll systems (MSA and PeopleSoft) and two different pay cycles (semi-monthly and bi-weekly); the two payroll systems drive different payroll processes; the county has no standard workweek and must manage multiple work schedules; there is no consistency in pay period data; agency payroll staff and central payroll operations staff have different standard practices, procedures and schedules. These challenges (and others) make it difficult for the County to efficiently manage and process pay for its employees.

## Recommended Business Process Design

The recommended design approach is that all county employees be paid by PeopleSoft HCM and that they be paid on common, bi-weekly pay cycle. That PeopleSoft HCM will be the system of record for all county payroll administration processes. The ABT Program recommends that the migration of county employees from the MSA payroll system to PeopleSoft be phased in, agency by agency. During implementation, the ABT Program will work with each agency to ensure that their essential business needs are accommodated by PeopleSoft. If required, ABT will work with each agency to integrate agency required interfacing systems to PeopleSoft, modify their business process to achieve best practices as incorporated in PeopleSoft. ABT will work with agency staff to train them on the new business process and how to complete payroll administration activities they are responsible for using PeopleSoft HCM.

The major requirements that the design approach will address are:

- Facilitate employees entering time once via PeopleSoft Time and Labor or a limited number of third party capture systems that interface with PeopleSoft Time and Labor.
- Facilitate accounting, labor distribution and project coding is capture and edited during the time capture process.
- Ensure that accurate and timely payroll information is provided to the financial system and that it meets labor distribution, project and grant accounting business needs of the county.
- Ensure that payroll information is provided to agencies and that it is accurate, accessible, timely, and meeting their business needs.
- Ensure payroll information provided to employees that is accurate and accessible.
- Facilitate central administration of all payroll administration services such as implementing the payroll provision of union contracts, W-2 processing and administering payroll policies and procedures.

## Assumptions

- County has multiple work weeks that include, Saturday to Friday; Sunday to Saturday; Monday to Sunday; that will continue.
- All county work weeks will have a common payday and pay period end i.e. every other Thursday (payday) and every other Friday (pay period end).
- The County's general ledger period end closing process will be standardized.

## Modules supporting process:

- Payroll North America
- ePay

## HLBD Requirements and Design Session Summary

Because most of the design decisions for Payroll Administration were agreed to in earlier parts of the project the ABT Program did not conduct any design sessions on the payroll administration process during High Level Business Design. We did have sessions on payroll related processes for Time Administration and Leave Administration.

- **SEE SEPARATE DOCUMENTS – Session Power Point Presentations, Session Notes, and Session Background Documents**; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

## Functional Gaps

- None identified

## Issues

- Employees moving from semi-monthly cycle to bi-weekly cycle wait longer to receive paychecks, will have impact on their finances;
- Employees receive less pay on each check but get 26 paychecks instead of 24 paychecks - annual salary remains the same;
- Employees will have to adjust to a different payday;
- Labor Relations will need to bargain the affects of the change to a bi-weekly cycle with unions.
- Several Agencies currently hold overtime earned by employees until the next payday (not allowed in a bi-weekly cycle);
- Need to decide the timing of the General Ledger period end closing;
- Potential impact on billings to outside agencies;
- Timing of employee deduction payments to outside agencies such as Department of Retirement Systems reporting and payments, Child Support agencies, credit unions, Employee Unions, Union required benefit carrier payments, etc.;
- Need to decide if County will have more than one standard work week.

### Organizational Impacts

- The change to a bi-weekly payroll cycle affects approximately two-thirds of county employees.
- Depending on the decisions made, the general ledger period end closing process will change for all or major portions county departments/agencies.

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Entering Time	Employee	
Approving Time	Manager	
Correcting Time	Agency	
Creating Payable Time	FBOD	
Calculating Payroll	FBOD	
Distributing Checks	FBOD	
Payroll Administration	FBOD	

# Benefits Administration Business Process

## Business Process Description

The benefits administration process refers to the activities required to manage health and insurance benefits for active employees, employees on leave and employees who leave county employment (COBRA and retiree benefits) ; Flexible spending accounts; Retirement system enrollment and information; Deferred compensation plan enrollment and education, new employee orientation, leave and exit classes and deferred compensation seminars.

There is consensus that county benefits administration business processes reflect best practices supported by the county's PeopleSoft HCM environment. The recent implementation of BHIP addresses many of the improvement and high pay back opportunities identified in the QBC Report.

## Recommended Business Process Design

The current benefits administration process follows best practices and will be brought forward by the ABT Program. The ABT Program will implement a consistent Benefits Administration business processes supported by business rules within one Human Resources/ Payroll (HR/Payroll) system. The future business process will include the implementation of employee and manager self-service for benefits administration and will provide multiple means of accessing data.

## Assumptions

- The current benefits administration process follows best practices and will be brought forward by the ABT Program. This does not impact or add risk to the program.

## Modules supporting process:

- Benefits Administration
- eBenefits

## HLBD Requirements and Design Session Summary

Because most of the design decisions for Benefits Administration were agreed to and implemented during earlier parts of the project the ABT Program did not conduct any design sessions on the benefits process during High Level Business Design. We did have a related session on the current PeopleSoft configuration where we identified the need to review the current benefits PeopleSoft configuration to determine if we can streamline and simplify the operational business processes.

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### Functional Gaps

- None identified

### Issues

- The current configuration of the Benefits Administration and eBenefits modules of PeopleSoft need review to determining if the functionality can be changes to streamline and simply the operations business process.

### Organizational Impacts

- None identified

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
Open Enrollment	FBOD	
Benefits Enrollment	FBOD	
Deferred Compensation Administration	FBOD	
Retirement Administration	FBOD	
COBRA Administration	FBOD	
Benefits Carrier Payments	FBOD	
New Employee Orientation	FBOD	
Health Benefit Administration	FBOD	

# Systems Access Business Process

## Business Process Description

The systems access process refers to the steps to access PeopleSoft HCM by management and staff.

The systems access process steps addressed during HLBD using PeopleSoft functionality (HRMS Portal Pack and Community modules) included: demonstrating how employees can access PeopleSoft self-service via the Internet and Intranet; demonstrating how employees can access their benefits, payroll, time reporting and training information online; demonstrating how employees can access PeopleSoft web reports. We also explored the PeopleSoft Enterprise Portal functionality.

The current County PeopleSoft access environment has gone from two production applications to one with the upgrade to PeopleSoft 8.9 and supports HR, Payroll and Benefits with a single sign-on. The County owns licenses for the HRMS Portal Pack and the HRMS Portal Pack is currently in use. The county does not own a license for the Enterprise Portal module.

## Recommended Business Process Design

The PeopleSoft system access improved tremendously as a result of the upgrade to PeopleSoft 8.9 that was completed in October of 2007. We recommend that this functionality be carried forward in the ABT Design. This recommended design meets the “PeopleSoft single sign-on” business requirement for system access. Based upon the review and the analysis of the Enterprise Portal functionality we completed during the HLBD session we do not recommend that we implement the Enterprise Portal module.

## Assumptions

- None noted

## Modules supporting process:

- HRMS Portal Pack
- Community Portal
- Enterprise Portal (county does not own license)

## HLBD Requirements and Design Session Summary

- **SEE SEPARATE DOCUMENTS** – Session Power Point Presentations, Session Notes, and Session Background Documents; available on the ABT Share Point site at: <http://shareman/ABTProgram/Payroll%20Process/Forms/AllItems.aspx>

### Functional Gaps

- None identified

### Issues

- None identified

### Organizational Impacts

- None identified

### Roles and Responsibility Impacts

Major Tasks	Who	Comments (Impacts)
System Login	Employees	