



a-align: to put things into appropriate relative positions; come together in agreement or alliance.

At Multnomah County we reserve the right to work smarter.

HUMAN CAPITAL MANAGEMENT EXECUTIVE OVERVIEW

Sponsor: Travis Graves

Our HCM team is moving fast as they continue in the design phase of the Multco Align project. So far they have spent over 35 hours designing our new system. As you can see below, a tremendous amount of work was completed in the 13 areas summarized here.

We are beginning to move away from how we have traditionally described our work and are adopting the new Workday language. So this may sound different/new to you but we see these updates as our opportunity to get accustomed to the language together. Questions are encouraged, and can be points of interest to follow up on when Lorraine Newell joins you in department meetings. You are also welcome to anonymously refer questions to [Multco Align FAQ](#) and responses will be posted on [HCM Team page](#) when that page is expanded.

I've had the pleasure to sit through a few design sessions over the last week, and I must say it's really made me excited about our future. This system is going to give us access to information in a way that we've never experienced. An when I say "us," I really mean all Multnomah County employees. As we knew we would find, there are some places where the system will work in ways that are different from our current practices and there are others where the system will greatly enhance how we already do our work by automating process, providing reminders to encourage accountability, and give us information about our workforce that we've never been able to see.

The HCM team is using the [Guiding Principles](#) adopted by the Steering Committee as they make their decisions, but it's also really important for you to take the time and read through their summaries and to participate in the resource group sessions. Your feedback is critical to ensure that we implement our new system in a way that supports everyone's work.

JOBS & POSITIONS

Lead: Susan Mullett



Decisions

- ★ **Position Management:** will be used
- ★ **Position Sharing:** will not be used unless in Job Overlap
- ★ **Hiring Restrictions:** for positions can be changed by the HR Partner
- ★ **Job Titles:** maintaining them is handled by Class/Comp/Recruiting for:
 - Job Profile Title
 - Job Posting Title
 - Position Title



Work Streams that continue in Architect phase

- **Initiate/Create Position:** current to future change identified

- **Management Levels:** determined for Workday
- **Job Profiles:** maintaining them
- **Lead Premiums:** tracking in Job Profile/Position/Worker
- **Job Profiles:** criteria for marking them Difficult to Fill or Critical Job

EMPLOYEE LIFECYCLE & EMPLOYEE SELF-SERVICE

Lead: Amy Aragon



Decisions

- ★ **Hire business process:** use, and add To Do steps
- ★ **“Getting Started” Worklet:** on Home landing page for 31 days
- ★ **Pre-Hires:** will be able to access Workday for on-boarding
- ★ **Change Job:** use proposed business process
- ★ **Regrettable field:** if checked, notification sent to 2nd level manager
- ★ **Terminee as Self:** has limited access to view tax documents for set period of time



Work Streams that continue in Architect phase

- **Hire Reasons:** determine values and definitions
- **Service Dates:**
 - 8/16 - Functional Leads deep dive
- **Recall/Reinstatement/Transfer Lists:**
 - 8/30 - Functional Leads deep dive
- **Hire Process:** define To Do steps
- **Veterans data flows:** from Recruiting to On-Boarding
- **Approved pre-hire paperwork:** determine available for completion prior to first day
- **I9s:** develop business process recommendation for One County
- **SSN verification:** develop business process recommendation for One County
- **Change Job Reasons:** determine values and definitions
- **Letters generated:** to HR, Budget, and Employees
- **Probationary Reviews:** determine if can be kicked off via the Change Job process
- **Termination Reasons:** determine values and definitions
- **Exit Survey:** research using Workday’s Questionnaire functionality
- **Address List:** determine values and definitions
- **Workday photos:** develop recommendation
- **Licenses:** develop list of required licenses for Job Profiles
- **ODE personal equity data:** research ability to internally track via ESS

HR REPORTING

Lead: Amy Aragon



Decisions

- ★ N/A



Work Streams that continue in Architect phase

- **HR Report Inventory:** review to determine reporting gaps/wishlist

BENEFITS

Lead: Tami Mahrt



Decisions

- ★ **PERS and 457B:** will be built as Benefits Plans
- ★ **VOYA:** will integrate with Workday Payroll
- ★ **Personal Relationship Field:** maintained by committee of HCM, Payroll, Benefits



Work Streams that continue in Architect phase

- **PERS and 457B:** determine business process between Payroll and Benefits
- **COBRA Administration:** determine business process

ABSENCE MANAGEMENT: TIME OFF

Lead: Cessa Diaz



Decisions

- ★ **Absence Partner:** security role will sit in HR
- ★ **Time Off Requests:** Manager/Employee able to update in balance transfer process
- ★ **Eligibility:** is tied to Job Profiles, not positions



Work Streams that continue in Architect phase

- **Pay Implications:** research capability to add alert to business process that warns manager there are pay implications to a schedule change
- **Seniority Dates:** research capability to add seniority dates to the Requesting Time Off business process
- **Vacation Accrual:** research capability to add notification to business process that notifies employees that they are close to maxing out their vacation accrual
- **Executive Vacation Hours:** assess how often exec classifications receive additional vacation hours at time of hire
- **Holiday and Observed Holiday Calendars**
- **Catastrophic Leave Donations** -Lead: Tami/Vanessa
- **Time Off Policies:** review and either confirm or update

ABSENCE MANAGEMENT: LEAVE

Lead: Tami Mahrt



Decisions

- ★ **Adjust Service Dates:** add To Do for HR Partner to adjust dates as needed
- ★ **Restrictions:** add To Do step for HR Partners to consult with Managers on restrictions before approval
- ★ **Return to Work:** add approval step for HR Partner to return an employee to work
- ★ **Absence Calendar:** use for requesting time off and leaves
- ★ **Leave Requests:** use soft errors for requests denied by Absence Partners
- ★ **Leave Conditions:** use type to set up route to Dept Absence Partner or Benefits
- ★ **Documentation:** HR Absence Partner To Do step to collect documentation and store in approved system



Work Streams that continue in Architect phase

- **Return to Work:** collect and analyze dept policies for return to work light duty and return to work after 3 consecutive days of sick time
- **Return to Work:** develop business process recommendation for One County
- **Denied Leave:** determine if follow up is needed with employee outside of Workday

TIME TRACKING

Lead: Cessa Diaz



Decisions

- ★ **Absence Calendar:** use to enter time off, rather than Time Tracking
- ★ **Escalation:** Payroll is the last resort for time edit only when urgent and no one else is available—path is: Employee, then Manager, then Time Admin



Work Streams that continue in Architect phase

- **Projects and Grants:** determine how time tracking used in Workday Projects
- **Work Schedules:** collect/analyze schedules; develop recommendation for One County process
- **Costing Overrides:** analysis on costing overrides, worktag values, and override rates to payroll
- **Work Orders:** determine integration with Tririga to populate time on Work Orders
- **Timing:** determine timing for time submittal, approval and pay dates

CONTINGENT WORKER

Lead: Jodi Ballard-Beach



Decisions

- ★ **Tracking:** certain workers not paid through Mult Co will be tracked in Workday



Work Streams that continue in Architect phase

- **Types:** identify contingent worker types, definitions, and system/facilities access

TALENT MANAGEMENT

Lead: Amy Lippay



Decisions

- ★ **Relocation and Travel fields:** chose not to include
- ★ **Certifications:** set alerts to notify employee of expiration date; create report for all employees with certifications



Work Streams that continue in Architect phase

- **Requirements:** collect lists of required education, certifications, recognition awards, field of study, and degrees values for configuration

COMPENSATION

Lead: Susan Mullett



Decisions

- ★ Use Workday reporting/tracking for pay analysis. Use Grade Profile to compare compensation for like Job classes across departments for equal pay.
- ★ FTE is calculated as follows: $FTE = \frac{\text{Scheduled weekly hours}}{\text{Default Weekly Hours}} \times 100\%$
- ★ Use 2080 hours when converting Salary to Hourly wages



Work Streams that continue in Architect phase

- Create and define all Activity and Premium pays, determine which will be in Time Tracking or Compensation -Lead: Susan/Cessa
- Define business case and requirements for Local 88 Market Study: Step and ½ Step increases -Lead: Susan/Cessa
- Determine if we need to create a new security group specifically for Labor Relations -Lead: Cessa

PERFORMANCE MANAGEMENT

Lead: Amy Lippay



Decisions

- ★ **Templates:** design performance review templates in Workday as closely as possible to current state while staying within ERP Program design principles
- ★ **Position Review:** include as a section in annual performance planning template
- ★ **Probationary Review:** single template used countywide, performance indicators hard coded as “competencies”
- ★ **Probationary Review:** templates will not include “core competencies”
- ★ **Anytime Feedback:** will be out of the box for Prototype 1 review
- ★ **Goal Attributes:** Description, Due Date, Completion Date, Percent Complete, Goal Categories (ie: Strategic, Operational, Organizational, Personal, etc)
- ★ **Goal Weighting:** will not include weighting for goals

- ★ **Ratings** (Probationary & Annual): set validation for lowest rating (need 2nd level manager approval); set To Do for second lowest rating (launches Development or Performance Improvement plan)



Work Streams that continue in Architect phase

- **Probationary Review:** collect templates
- **Ratings:** develop recommendation for universal rating scale
- **Annual Review:** develop recommendation for focal point Annual Review
- **Sub-standard Performance:** assess current tools for managing it

PAYROLL

Lead: Vanessa Witka



Decisions

- ★ **Pay Stubs:** employees can view and export stubs as soon as pay cycle complete
- ★ **Direct Deposit Elections:** maximum of (5) payment elections allowed
- ★ **W-2:** employees can view and export their W-2



Work Streams that continue in Architect phase

- **Payslips:** review contractual/legal requirements to determine required earnings and deductions shown on employee payslip
- **Opt-Out Payments and Overtime:** determine coordinated business process between Payroll, Benefits, and Time Tracking

DISCIPLINE / GRIEVANCE

Lead: Cessa Diaz



Decisions

- ★ **Performance Improvement Plan:** consistent templates for Multnomah County; include letter of expectations (routing can vary based on template)
- ★ **Discipline process:** manager initiates process with a step for HR review
- ★ **Discipline template:** Deloitte to build out template for P1; include rating scales



Work Streams that continue in Architect phase

- **Custom Objects:** Discipline, Grievance, ADA, EEO Complaints, Light Duty
- **Templates:** create templates for Discipline