Human Resources Business Process Review for:

Presented by:

FERRILLI

Prepared by: Michelle Demchik & Nick Elliott

December 22, 2015
# Table of Contents

Summary ........................................................................................................................................... 3

- Background information ........................................................................................................... 3
- Project Scope .......................................................................................................................... 3

Observations & Recommendations .......................................................................................... 4

- High Level Review - Grace Cabrera - HR Operations Manager .............................................. 4
- Crystal reporting and conversion to CROA .............................................................................. 4
- Positions - Creation/Control and Onboarding/Exiting ............................................................. 4
- Assignment Contracts .............................................................................................................. 6
  - Data Entry for Faculty Assignments ....................................................................................... 6
  - Step Movements .................................................................................................................... 7
  - CLPS (Change Load Period Status) ..................................................................................... 7
  - Faculty Contracts .................................................................................................................. 7
- Payroll processing ..................................................................................................................... 8
- Web Time Entry and Leave Processing ................................................................................... 9
- Benefits/Deductions ................................................................................................................. 12
- Benefit Enrollment Online ....................................................................................................... 13
- ACA setup and reporting .......................................................................................................... 14
- Online Forms .......................................................................................................................... 15
- Security Review ....................................................................................................................... 16
- Online Accounts ..................................................................................................................... 16
- Software Updates .................................................................................................................... 17
- WebAdvisor/StaffNet ............................................................................................................... 17

Conclusion ..................................................................................................................................... 18

Appendix A: Groups and Staff Interviewed .............................................................................. 19

Appendix B: Agenda .................................................................................................................... 20
Ferrilli is a diverse group of higher education professionals that blend together their different perspectives, talents and skill sets to make your institution a success. For the past 12 years, Ferrilli has had the opportunity to serve over 120 institutions with one mission in mind: to make you a success while exceeding your expectations.

Summary

Background information

The Yosemite Community College District (YCCD) includes two comprehensive, two-year colleges (Columbia College and Modesto Junior College) and a Central Services unit. The District includes all of two counties (Stanislaus and Tuolumne) and parts of four others (Calaveras, Merced, San Joaquin and Santa Clara). Employees are represented by two bargaining units - YFA (Yosemite Faculty Association) & CSEA (California School Employees Association Chapter 420).

Student Counts:
MJC has approximately 25K students
Columbia College has approximately 3.5K students

Employee Counts:
Permanent 2500/3000
Adjunct 500/600
Student Workers 300/400
Stipend 150
Short Term Contracts 30

Project Scope

The Ferrilli Assessment Team will perform a business process review for YCCD and focusing on the functional use of the Ellucian Colleague ERP system specific to the Human Resources module. Our assessment will include:

- Perform a pre-assessment review of policies and procedures manuals and current Colleague process documentation.
- Interview HR staff personnel regarding their business functions and use of Colleague.
- Make adhoc recommendations for quick resolution items during the interview process.
- Develop a strategic plan for changes to the functional use of the HR module and how to optimize current workflows.
Observations & Recommendations

High Level Review - Grace Cabrera - HR Operations Manager

We interviewed Grace Cabrera to determine the areas of Human Resources to examine and that they wanted specific help with. After review we were able to create an agenda (See Appendix B) that broke things down into the separate areas and functions, including some time with the Payroll office. Areas we covered included:

- Review custom Human Resources processes with Information Technology Services
- Positions - creation/control and onboarding/exiting processes
- Payroll processing
- Assignment Contracts
- Web Time Entry
- Leave Processing
- Benefits/Deductions
- Benefit Enrollment Online
- Affordable Care Act (ACA) setup and reporting

Crystal reporting and conversion to CROA

Out of all the reports created in Crystal Reports for Human Resources, only roughly half are used. Many out of date reports exist from past employees or older reports that are simply no longer used. Users do have the reports they need and Information Technology Services is very helpful when new reports or changes to existing reports are needed.

Recommendations

A review and cleanup effort is needed prior to converting to SQL / CROA to minimize the number of reports that will need to be converted.

Hours estimate: 8-16 hours depending on the number of reports.

Positions - Creation/Control and Onboarding/Exiting

Most district positions are advertised through a PeopleAdmin site, with the exception of student positions which the hiring is directly by the departments themselves. Students are processed by Human Resources. Short term contracts and Stipends start in HR, then Payroll gets a copy. For the remaining
Classified, Adjunct, Faculty and Manager positions, they are processed by HR, then a payroll action form is needed and sent to Payroll to process.

YCCD do not currently use Position Control or Position Budgeting. The fiscal and financial sides were interested in exploring these options for better planning, but they were concerned about having to overhaul their entire position creation methodology. Despite fiscal having more information, Human Resources would be the ones to do the bulk of the work on this.

The current position naming convention is as follows:
AAA B -CCC- DDD E F

Where A is the three character Department name, B is the College, C is the division name, D is a numeric position control number, E is a position number, and F is an identifier with a range of different options. e.g. - NURM-ALH-292CA is a Nursing, MJC - Allied Health - Pt/Instructor, it’s the third position and adjunct. Currently they were happy with this and there were no plans to change this convention

Currently when creating and assigning new positions, full time positions are already in the system and just need assigning, but student positions are checked against an excel spreadsheet outside the system. If the position didn’t exist, then they create it then and assign it.

Due to previous data entry errors, there are a few positions that have been assigned that are actually the same as other positions in the system, just a digit here or there had been transposed.

In some circumstances for student positions, the requests come in very close to when web time entry needs to happen as well, and there is a delay as Payroll are the only ones who can authorize web time entry on a person (in EPOV).

Also for Stipend positions, people get a generic position with no wage record, then payroll has to enter Stipends and override the earn types every-time they need to pay. This also creates a delay and doesn’t have the correct earn type for that person. After a person is paid, HR then has to search reports to match up a person being paid.

When closing out positions, they have a good monthly process for full time employees that includes a step to inform Information Technology Services as well for removal of system access. For student employees and adjunct faculty they have a process they run once a year to clean up positions. For adjunct faculty, unless they have not been paid in four consecutive semesters, they keep all of their positions open, and they still have system access during that time. They also have positions open in the system that have not been paid in years.
Recommendations

- Position cleanup project - analyze all assigned positions and make sure all conform to their existing naming conventions.

- Inactivate unassigned or unavailable positions.

- Work with Information Technology Services to create a payroll report listing adjuncts not paid in a certain time period. System access can then be removed without closing positions.

- Allow HR to create stipends themselves. That way the correct earn type can be used, and they can enter position information and any other hours worked needed for ACA reports without creating extra work for Payroll.

- Investigate PeopleAdmin export report for import into Colleague.  
  **Hours estimate: 20 - 40 hours for custom import**

- Alter position lookup to sort for active positions only.  
  **Hours estimate: 8 – 16 hours**

- Allow Human Resource staff access to the EPOV - Eligible for Web Time Entry field, either by using field security or a custom screen that just has the Yes/No flag needed.  
  **Hours estimate: 16 - 24 hours for custom screen**

Assignment Contracts

Assignment Contracts was first implemented in 2004 with minimal customizations to Colleague. The data entry process and workflow related to Assignment Contracts involves department secretaries along with Human Resources and Payroll staff along with outside databases. Full-time faculty receive base load at 100%, overload which is capped at 67% (but overage is allowed) and reassign time (part of base load). Adjuncts load is strictly capped at 67% but this must be manually checked and adjusted. Adjuncts do not receive reassign time. Non instructional adjuncts are not paid by assignment contracts, they are processed as hourly employees.

Data Entry for Faculty Assignments

Department secretaries are having to update FASC (Faculty Section Assignment) multiple times for each course section. Initially, faculty are added as instructors to the sections. Then once Human Resources and Payroll complete step movements, secretaries must later added in the assignment contract fields on each faculty section assignment.
When course assignments are created or modified after the initial contracts have been printed, these are processed as pay claims and hand typed contracts. These pay claims are submitted to Payroll which then enter hourly rates for each payroll cycle. The faculty must submit a pay claim for every pay period which Payroll manually enters into Colleague. Payroll does have a goal to move these pay claims to web time entry to cut down on the processing.

**Step Movements**
Payroll processes reports in an Access database to determine when faculty move to their next step level and both Payroll and Human Resources process the step movements manually in Colleague.

**CLPS (Change Load Period Status)**
Payroll processes the CLPS process once per semester to create the stipends. The Payroll department feels this process should be completed in the Human Resources department. When classes are cancelled or faculty assignment changes occur, Payroll processes these payments manually. These changes require Payroll to manually make changes in multiple areas: Colleague stipends, the outside database (used for printing reports) and Excel spreadsheets.

Only the initial course payments are processed smoothly in the Assignment Contract module. This causes confusion when additional or late payments are processed. These late payments also cause issues with Affordable Care Act reports, reporting in general, reconciling and possibly W2s.

Manual verification is done to maintain a 67% load for adjuncts. The custom subroutine does not currently cap load amounts which then creates overpayments in stipends.

**Faculty Contracts**
Payroll, Human Resources and Information Technology Services work together to process and print faculty contracts/reports. Once CLPS (Change Load Period Status) has been processed, data is exported to a .NET platform database which is used to print the individual faculty contracts. Contracts are then sorted and distributed by department. Contracts may not be received by faculty until the 4th week of each semester. Late starting assignments and changes to assignments are processed outside of Assignment Contracts and are not included in the faculty contracts. The Information Technology Services department agrees with retiring the .NET database used as this will need to be re-written anyway during the SQL migration.
**Recommendations**

Fully investigate and strongly consider additional customizations to the “Faculty Load and Assignment Contracts” functionality in Colleague to bring all aspects into one database.

- Create a custom process in Colleague to process faculty and adjunct step movements in a timely manner which will eliminate the need for multiple entries into FASC.  
  *Hours estimate: 40 - 80 hours depending on complexity of step movements.*

- Create a faculty assignment contract report that pulls information directly from Colleague eliminating the need to export and print contracts from an outside database. Also create a custom screen to allow faculty to view their contract reports via WebAdvisor/StaffNet.  
  *Hours estimate: 80 - 160 hours*

- Create procedures to run CLPS multiple times a semester to automate the creation of stipends for late entries. This would eliminate the need for manual pay claims and web time entry for this process.  
  *Hours estimate: 16 - 24 hours for documentation and training*

- Update the custom subroutine which calculates payments to cut off adjuncts at 67%.  
  *Hours estimate: 12 - 16 hours*

**Payroll processing**

Payroll currently runs four different pay cycles on a monthly basis: Hourly, Student, Regular Classified and Regular Faculty. There are various deadlines for each different cycle which involve Human Resources, Payroll and Accounts Payable as they have to cut checks for various payments.

Full time cycles run from the first through the end of a month, and the cut off for this is the 15th and is to be paid at the end of the month. Other part time and hourly cycles run from the 21st to the 20th of the next month and are then paid on the following 15th of the month after. Overload payments for full time faculty are also paid on the 15th.

There is a concern from the YFA union under California education code that they should be being paid on the 10th of the month instead. While they are not overly concerned about this just yet, we talked about various ways to alter existing pay cycles.

They have around 80 different earn types for different positions and methods of payment. This in itself isn’t that bad, except that quite a few positions for people are setup as generic positions - and when payroll goes to process, they have to override the earn types for these positions. The examples given were related specifically to retirees, but there were others as well.
They also asked us a couple of process questions on how to handle some alterations needed to some YTD/QTD data fields on EOVC - and we were able to help them understand that screen a little better.

Payroll has issues updating some of the CALPERS retirement benefits. Some were at 7% and others were at 6% when they should’ve been the other way round. No concrete examples were given to allow for further data analysis.

They also deal with many paper claims from adjuncts who miss the cutoff time from assignment contracts, this was covered in the assignment contracts section.

When printing checks, payroll calculates them, Information Technology Services prints them and Human Resources mails them. Having multiple departments involved with paychecks raises concerns with separation of duties.

**Recommendations**

- Have Human Resources create additional positions for specific earn types to save Payroll time and effort.
- Change hourly/part-time pay cycles to be paid on the 10th of a month either:
  - Make one quick change, which is easier for payroll but more difficult for employees
  - Or do a rolling pay cycle change, moving cycle dates and pay dates back one day each month, which is easier on employees, but more work for payroll.
  
  **Hours estimate: 40 hours to perform an in-depth review and plan**

- Review setup and changes to CALPERS retirement benefits.
  
  **Hours estimate: 24 – 48 hours**

- Create procedures to run CLPS multiple times a semester to automate the creation of stipends for late entries. This would eliminate the need for manual pay claims and web time entry for this process.
  
  **Hours estimate: 16 - 24 hours for documentation and training**

- Change procedures related to processing and printing check to lie exclusively within the Payroll office.

**Web Time Entry and Leave Processing**

Web Time Entry is currently only used for student workers. They are interested in bringing up other groups and would like the leave portion used. Reports are defined in Crystal Reports for departments and managers, which are working well. Once the student worker paperwork has been submitted to Human Resources, end dates on positions are added for controls. No customizations have been made to
web time entry although users expressed some customizations (removing overtime and leave columns, capping time at 20 hours) which would alleviate some issues.

Leave accrual and updates are all done manually and are not currently processed in Web Time Entry. Each specific group of employees are processed differently through separate databases, Excel spreadsheets and manually. They have many issues with leave accruals and employees receiving incorrect amounts. Updates to leave accruals are not made in a timely manner. The posting of information needs to be earlier to reduce the number of questions and phone calls from employees. Each groups has specific, complex leave time accrual.

- Employees on suspend pay with multiple positions are currently receiving double leave accrual which is manually adjusted.
- Adjunct overload sick leave calculations reside on a stand-alone .NET system. Data is exported from Colleague to .NET, calculations are made and changes are updated back into Colleague manually.
- Full time classified management sick accrual are posted yearly and vacation accruals are updated monthly using batch processes.
- Students and short term employees receive one hour of sick leave for every 20 hours worked. Students are capped at 20 hours worked per week (manually checked). Accrual hours are capped according to a California mandate and employees must stop accruing once that cap has been reached.
- Full Time faculty have two sick leave plans. One for their salaried position and another for their overload hours. They also must take sick leave according to which time they are using (salary or overload). Vacation and sick leave is currently processed manually but is in the Colleague system.
- Leave time for Permanent Part Time Hourly is stored in Excel spreadsheets and is not in Colleague.
- Classified and Management staff have personal necessity sick leave which is entered multiple times, manually into Colleague (once for personal Necessity and again for sick leave). They also have issues processing workers comp and extended sick leave. When the cap is reached time used must convert to vacation leave or pay must be docked.
- Board members frequently approve employee action changes (example, management to faculty) which are processed manually and could touch multiple databases and spreadsheets.
- Staff with multiple positions and regular classified positions going to interim positions both have issues with accrual. Also, faculty with reassign time and multiple positions are not getting their full accrual. Custom subroutines are used for accrual which do not take into account multiple positions.

Groups they would like added to Web Time Entry are Part Time Hourly, Non-Instructional and Short Term Contracts. They are considering adding adjuncts as a solutions for late entered assignments (pay claims).

As new employees are brought on, there is a slight delay in Web Time Entry processing due to the numerous staff and departments involved. Human Resources must enter employee information, Payroll must check the Eligible for Web Time Entry box on EPOV, then Human Resources completes communications to the employee.
Users also expressed a need for additional manager training related to approving and rejecting time. Confusion among employees exists about which department corrects leave records and balances. Employees would also like to view additional leave detail via StaffNet.

**Recommendations**

It is recommended to bring up additional groups using a staggered roll out, for both Web Time Entry and Leave Plans in Colleague/StaffNet. This eases the transition on the payroll staff and reduces issues while they adjust to the new payroll processing procedures.

**Hours estimate:** Multiple aspects are involved related to setup, training, testing, reports and rollout. A more detailed project plan is needed to estimate hours per rollout group.

Additional training related to both Web Time Entry and Leave Plans is recommended due to the vast differences between the different groups. It is also recommended to customize these processes to best benefit each group. Customizations will drastically decrease the number of questions and confusion with the processes from employees.

- Training and creation of help documents for managers.
  **Hours estimate:** 2 days for training and document creation.

- Customizing the current Student Worker Web Time Entry screen to cap time worked at 20 hours per week.
  **Hours estimate:** 16 - 24 hours

- Breaking down the views on the supervisor screen when multiple employee groups are added to Web Time Entry.
  **Hours estimate:** 16 - 24 hours per rollout group

- Allow Human Resource staff access to the EPOV - Eligible for Web Time Entry field, either by using field security or a custom screen that just has the Yes/No flag needed.
  **Hours estimate:** 16 - 24 hours for custom screen

- Create a custom process for salaried employees to enter leave time as they are not required to enter specific hours. Create a process to approve/reject leave requests through StaffNet since these functions do not currently exist with Colleague/StaffNet.
  **Hours estimate:** 40-80 hours

- Create a custom leave plan detail form in StaffNet similar to LDTS - Person’s Leave Detail Summary.
**Hours estimate:** 16 - 24 hours. Additional hours may be needed as more groups are added to Colleague leave plans.

- Review and enhance the custom subroutines related to full time sick leave and hourly vacation leave (S.ACCRUE.FT.VAC.LEAVE.Y20, S.ACCRUE.HRLY.VAC.LEAVE.Y20 and S.ACCRUE.FT.SICK.LEAVE.Y20). These calculate incorrectly when employees have multiple positions.

**Hours estimate:** 16 - 24 hours

**Benefits/Deductions**

Currently YCCD is happy with the way that benefits and deductions are functioning in Colleague with only a few minor exceptions. Some of their setup is easier as they use a composite rate for employees, so even if they have many or no dependents, they pay the same rate for a benefit/deduction - with some variations on age or longevity.

Voluntary life insurance for example has variable rates based on age bands, and their current setup is to have 6 different benefits, one for each age band to account for this.

We walked through some of the other benefit screens as well, and introduced them to PBEN, where they can enter in a beneficiary’s information.

The biggest issue they had is that retirees are not handled very well in the Colleague system, they do not run them through payroll and make payments and deductions that way. Retirees continue to get benefits potentially up to age 70, and is in fact free before the age of 65. Dependents are based on their own age, and they have an option to buy up or include dental and vision as well. YCCD currently operates on an honor system where they pay these benefit costs, and then if there are any costs to the retiree, inform them by mail and hope to recoup the additional cost. They currently have around 260 retirees in this system, with 175 of them fully funded by the district.

Currently they use a legacy system that they have many issues with and is currently either not supported or not supported well by the IT department. Everyone is in agreement that this system is archaic and they need something better and more relevant. For recommendations on retirees, see the Benefit Enrollment Online section.
Recommendations

- Walk through benefit setups to include age rate tables to reduce active benefit codes
  
  **Hours estimate: 16 – 24 hours**

- Create a custom retiree module for managing and reporting on retiree benefits, including WebAdvisor functionality to allow for retirees to view benefits.
  
  **Hours estimate: 200 – 240 hours**

Benefit Enrollment Online

Currently, annual benefits enrollment is completed on paper for all employees. Staff who are continuing coverage do not need to submit anything. All paperwork is scanned and sent by email on an individual basis to SISC (Self Insured Schools of California). Staff are frustrated with the different places that you have to access to view and change benefits.

YCCD also processes retirees annual benefit enrollment (roughly 200). Retiree data is held in a custom created database that is held outside of Colleague. Information Technology Services, Human Resources and Payroll all agree this system is not running efficiently and must be obsoleted. Retirees are currently not sent invoices and make premiums payments monthly by mailing in checks. They are looking for a recommendation on a new system that includes the ability to accept online payments.

Recommendations

- Purchase and implement the Benefit Enrollment Online (BEO) within Colleague. BEO can be used for "passive" enrollments (continue with current elections with no actions required). An electronic file can be generated that can be uploaded to SISC (Self-insured Schools of California). The only manual individual forms needed would be for any changes to existing enrollment with Kaiser.
  
  **Hours estimate: BEO Module cost - contact Ellucian. Hours estimate for implementation: TBD**

- While BEO does not currently work for setting up new hires, workarounds or customizations within BEO can be made to accomplish this.
  
  **Hours estimate: 24 – 48 hours**

- BEO will need to be customized to allow retirees to make their benefit elections online.
  
  **Hours estimate: 80 – 120 hours**
ACA setup and reporting

YCCD has been working with an Ellucian consultant to help setup and verify the ACA measurement reports, and also for the benefit extract data for use in the 1095-C creation process.

YCCD had been working in their Test environment on these reports, and were comfortable with the results. However, as their test environment was refreshed from the production environment for our visit, we were unable to directly observe the output data from these reports.

As a process goes, the 1095-C forms had been ordered, and IT will be responsible to do the printing. YCCD had some data issues with a retro payment that occurred during the year, which caused about 40 people to appear on the report when they should not have, but they are aware of how to make those corrections on the 1095-C work file.

They had also only recently started adding other hours to stipends not related to course sections, and while they know these may create some additional data this year, they have been monitoring people’s hours and loads to minimize the number of people who would work more than 30 hours a week on average.

They still have a few more steps with the IRS to complete, testing an upload on the IRS site and receiving a transmittal code, but those are just steps they need to work through. They are confident they can print and mail their 1095-C forms by the end of January.

Their setup was recommended as relatively simple, broken down only into eligible and non-eligible employees, and while on site we walked through the setup and report screens, giving quick advice on places to enter data. The one area they were not confident on were rules related to positions and when a person or position would be included on the reports.

We also advised them to run the reports in Summary mode first, and then if they had issues with any individual's data, to then run a detail report just for those employees. Previously they had been running these reports wide open, which take a lot of time, and there are lots of additional data rows that don’t necessarily need looking at.

Their intention for next year is to break down their employee groupings for better granularity.

On the benefits side of reporting, their initial setup had all 28 benefit codes available, which created a lot of data on the end of the process, and after testing realized they could cut this down to just 6 codes. We walked through the setup screens here too, and advised that if after running the monthly report (MHBO) and making any changes (on PHBO), not to rerun the monthly report for that month, as it wipes out all data and they would have to reenter any edits they made.
In terms of their process here, they had not yet decided when to continue to run the measurement reports during the year, and then the benefits reports afterwards. We talked about the various merits of running reports monthly and quarterly to avoid large end of year data cleanup.

Their final question was on COBRA reporting, they have a third party who administers this program, and none of this data is in the Colleague system. They had confirmation from their third party system that they would be reporting this data. While they had been advised to enter costs for COBRA, they were going to let the third party handle the reporting part and if necessary look at incorporating that data in next year's file.

**Recommendations**

- Assistance with creating different employee groupings for ACA measurement reports
  
  **Hours estimate: 16 – 24 hours**

- Training on Rules creation and data elements relevant to positions and ACA
  
  **Hours estimate: 16 – 24 hours**

**Online Forms**

Human Resources staff expressed the need for online forms. Currently only pdf forms can be downloaded from their website and StaffNet. These forms must be printed, completed by hand and submitted on paper. YCCD has a document imaging system called Matrix (On Base). With an additional purchase, this system could accommodate online forms. The district also licenses Microsoft SharePoint along with InfoPath on each employee PC although they were not sure if the forms piece was licensed. The Human Resources staff would prefer a system where they can create and manage their own forms without the need to rely on Information Technology Services for updates.

**Recommendations**

- A deeper look into comparing the college's current options around online forms is needed.

- Create custom StaffNet screens for each online form.
  
  **Hours estimate: Hours depend on the complexity of each form**
Security Review

Grace Cabrera, the Human Resources Operations Manager approves any access requested for Human Resources mnemonics. Once approved, there are never any audits completed to ensure security is accurate. Human Resources would also like an audit completed on all HR mnemonics to ensure they are not missing any newly delivered or overlooked mnemonics.

Recommendations

- Conduct a review of all Human Resources mnemonics to ensure security access for relevant staff.
  
  *Hours estimate: 16 – 24 hours*

- Conduct a yearly audit for Human Resources to review security they have approved for staff at the college.
  
  *Hours estimate: 16 – 24 hours*

Online Accounts

The Information Technology Services staff expressed a concern with duplicate records and new employees due to late starting adjuncts. These employees could begin teaching prior to any of their paperwork or account information being entered. A concern was also raised regarding closing out employees who are no longer active. Due to the sensitivity of online accounts, they would prefer to close out accounts as soon as possible. Certain groups of employees may remain active in the Colleague system longer than they would like.

Recommendations

- Review process workflow between Human Resources and Information Technology Services in regards to new employee online account creation and closing out employees who are no longer active.

- Work with Information Technology Services to create a payroll report listing adjuncts not paid in a certain time period. System access can then be removed without closing positions.
Software Updates

Human Resources staff commented about being overwhelmed by software updates.

Recommendations

- Submit requests to Ellucian to receive emails as new Human Resources Software Updates are released.

WebAdvisor/StaffNet

Three WebAdvisor instances are running mainly for branding purposes:

- ConnectColumbia Students and Faculty at Columbia College
- PiratesNet Students and Faculty at Modesto Junior College
- StaffNet Staff and Faculty from across the district

Human Resources reports the Total Compensation screen does not display the annual salary accurately for split positions.

Recommendations

- Customize the Total Compensation subroutine used to include annualized pay for all positions.
  Hours estimate: 8 – 16 hours
Conclusion

The HR application has very minimal customizations (unlike the ST application) and the Information Technology Services department understands the need for additional customizations needed; although, they may not have the resources due to the SQL migration.

Human Resources staff are eager to take a look at any and all improvement in the Colleague system. They are converting from the mindset of “because it’s always been done that way” to “work smarter not harder”.

It is our conclusion the following top priority issues will offer the most benefit to Yosemite Community College District:

- New retiree benefit system
- Assignment Contracts
- Web Time Entry & Leave Plans
- BEO - Benefit Enrollment Online

Ferrilli thanks you for this opportunity and we are excited to partner with you in the future.
Appendix A: Groups and Staff Interviewed

Human Resources
Gina Leguria - Vice Chancellor of Human Resources
Lucy Munoz - Executive Assistant to the Vice Chancellor of Human Resources
Grace Cabrera - Human Resources Operations Manager
Lia Maksoud - Human Resources Specialist
Barbara Wolf - Human Resources Specialist
Kaci Landis - Human Resources Specialist
Dora Lopez - Human Resources Analyst

Information Technology Services
Jennifer Ahlswede - Executive Assistant
Surinder Bhalaru - Systems & Programming Analyst
Fiodir (Eddie) Eissayou - Systems & Programming Administrator

Payroll
Diane Warren, Payroll Manager
Natalie Pence, Payroll Specialist

Benefits
Lori Smith, Employee Benefits Specialist
Margaret "Peggy" Frietas, Employee Benefits Specialist
Kathren Pritchard - Director of Human Resources
## Appendix B: Agenda

<table>
<thead>
<tr>
<th>Monday, December 14</th>
<th>Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Introductions &amp; system access</td>
</tr>
<tr>
<td>9:30</td>
<td>High level review and create agenda for week</td>
</tr>
<tr>
<td>1:30</td>
<td>Review custom HR processes. Review Ellucian modules owned. Talk about Crystal reporting and conversion to CROA. Online forms: Imaging system? SharePoint?</td>
</tr>
<tr>
<td>4:00</td>
<td>Nick and Michelle – Review findings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tuesday, December 15</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Nick and Michelle - prepare for additional questions/meetings</td>
</tr>
<tr>
<td>10:00</td>
<td>Positions - Onboarding &amp; exiting</td>
</tr>
<tr>
<td>11:00</td>
<td>Assignment Contracts</td>
</tr>
<tr>
<td>1:30</td>
<td>Payroll processing</td>
</tr>
<tr>
<td>4:00</td>
<td>Nick and Michelle – Review findings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Wednesday, December 16</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Nick and Michelle - prepare for additional questions/meetings</td>
</tr>
<tr>
<td>10:00</td>
<td>Web Time Entry</td>
</tr>
<tr>
<td>11:00</td>
<td>Leave Processing</td>
</tr>
<tr>
<td>1:30</td>
<td>Benefits/Deductions</td>
</tr>
<tr>
<td>3:00</td>
<td>Benefit Enrollment Online</td>
</tr>
<tr>
<td>4:00</td>
<td>Nick and Michelle – Review findings</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thursday, December 17:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Nick and Michelle - prepare for additional questions/meetings</td>
</tr>
<tr>
<td>10:00</td>
<td>ACA setup and reporting</td>
</tr>
<tr>
<td>11:00</td>
<td>Follow up items with IT</td>
</tr>
<tr>
<td>1:30</td>
<td>Position Management/control/budgeting and other ACA extra time</td>
</tr>
<tr>
<td>4:00</td>
<td>Nick and Michelle – Review findings</td>
</tr>
</tbody>
</table>