



HR AUTOMATION: DOHR - A CASE STUDY

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HR Forms Automation:

Empowering your agency's leaders to initiate personnel changes within their teams through direct access to ePAF

HR Forms Automation: DOHR – A Case Study

Why automate HR forms anyway? After all...

- “It’s just shoving all the clerical duties to managers”
- Leaders don’t have time to do electronic data entry
- Some HR staff perceive to be less customer-focused
- Even the commissioner would approve a couple more categories of personnel changes than under current system
- Fear of losing control of transactions

Why Forms Automation:

- It is NOT just shoving all the clerical duties to managers
- Many leaders already have some clerical tasks for personnel changes
- Easier than some leaders expected
- Commissioner easily approved even before executive briefing
- Less time, fewer steps
- Clear workflow
- Fewer misplaced or misdirected paper documents ('paperless')
- Direct access for leaders to check status
- Is actually more customer-focused
- E-approval no less 'control' than signed approval
- Automation empowers leaders with direct access to initiate personnel changes they are already authorized to make

How to implement (or “Where on earth do I start?”)

Determine stakeholders (and their needs/concerns)

- HRO
- Appointing Authority
- ELT
- Leaders
- HR staff

How to implement (or “Where on earth do I start?”)

Establish Executive support and Champion
(Appointing Authority and key executive leader)

- Communicate/Educate/Engage (WII-FM)
- HRO
- Appointing Authority
- ELT
- Leaders
- HR staff

How to implement (or “Where on earth do I start?”)

Thoughtfully establish project team

(cross-section of process for your agency)

- HRO
- Knowledgeable HR staff (“in the weeds’ knowledge)
- Agency leader
- Edison
- Determine project manager
- Communicate throughout process

How to implement (or “Where on earth do I start?”)

Establish process timeline

- Consider your agency’s annual business calendar
- Consider your agency’s annual HR calendar
- There is no ‘perfect time’

How to implement (or “Where on earth do I start?”)

Establish ePAF workflow for your agency

- Account for agency needs
- Communicate among project team; share wisdom
- Roles
 - Initiator
 - Reviewer
 - Fiscal
 - HR
 - ‘Second set of eyes’
 - Approver
 - Leader +1
 - Be thoughtful about how many

How to implement (or “Where on earth do I start?”)

Establish ePAF workflow for your agency – cont’d

- Don’t create unnecessary steps/wait time
- Determine whether HR will continue to initiate some (e.g., IV terms)
- Confidentiality when handling data
- Establish formal authorized backups for each role

How to implement (or “Where on earth do I start?”)

Edison Partnership

- Technical advisors and trusted sounding board
- Architects of ePAF system workflow
- Pre-work is needed
 - Who is in each role
 - Backups
 - Complexity varies by agency
- Agency security refresh and update may be needed

How to implement (or “Where on earth do I start?”)

Training

- Critical component
- All the way to front-line managers
- ‘In the weeds’ – details matter
- Training material = hands-on reference guide
- Complexity is agency-specific

How to implement (or “Where on earth do I start?”)

Training – cont’d

- Checklist for leaders - ‘what you need before you sit down to initiate transaction’
- Accuracy is critical at each step: no false data
- Avoid recycles - 5 minutes prep vs 5 days
- Toolkit and templates

How to implement (or “Where on earth do I start?”)

Training delivery

- Hands-on practice in test environment
- Cover all roles
- Include executive briefing
- Just-in-time training delivery

How to implement (or “Where on earth do I start?”)

Implementation

- Conduct pilot
- Partner with Edison
- All hands on deck
- Prepare stakeholders

Results

(or “How’d it go for you all?”)

- New implementation, gathering data
- Transactions in system sooner
- More streamlined - less paper, less time, fewer steps
- Leaders at every level easily adapt
- Improved accuracy
- Direct access for leaders to check status
- Accountability
- Clear workflow

Results (or “How’d it go for you all?”)

- Improved communication
 - More consistent in single documented stream
 - Consistent, timely inclusion of reviewers
- HR staff deploy to weightier customer services

Tips (and things we learned)

- Communicate more than needed
- ePAF notes don't replace live communication
- Accuracy is critical at each step
- No false data – Just say no!
- Consider and communicate details of process changes (e.g., wage conversations before initiation)
- Triple check security pre-work (role establishment)

Tips (and things we learned)

- Plan and communicate transition details
- Plan frequent follow up meetings
 - Identify issues and implement adjustments
 - Close out project
 - Identify next project
- CONFIDENTIALITY
 - Especially if employing work unit approvers
 - Employ agency document retention/destruction policy

Tips (and things we learned)

- Even executive leaders find process to be simple
- Expect project to generate discussion about other processes and opportunities to become more efficient
 - Especially if not LEAN, or has ambiguous accountability



THANK YOU