

**Columbia University
People @ Columbia (PAC) Project**

**Columbia University Medical Center
Human Resources/Office of Faculty Affairs**

March 17, 2004

Agenda

➤ **People @ Columbia**

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- **FAHRIS/PeopleSoft Integration**
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- **FAHRIS/PeopleSoft Reporting Approach**
- **PeopleSoft Employee & Manager Self-Service Functionality**
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PAC Scope of Project Phases

Phase I (September 2003 to October 2004)

- Standardized, Common, Integrated HRMS Data/Information
- Human Resources (Hire to Retire)
- Regulatory Reporting
- Employee Self Service/ Inquiry by Managers
- Faculty Tracking
- FAHRIS Interface to PeopleSoft (Hire/Rehire)
- Benefit Plans for Employees
- Payroll
- Quarterly and Annual Payroll Reporting
- Payroll Self Service (Direct Deposit, Paycheck, W-4 changes)

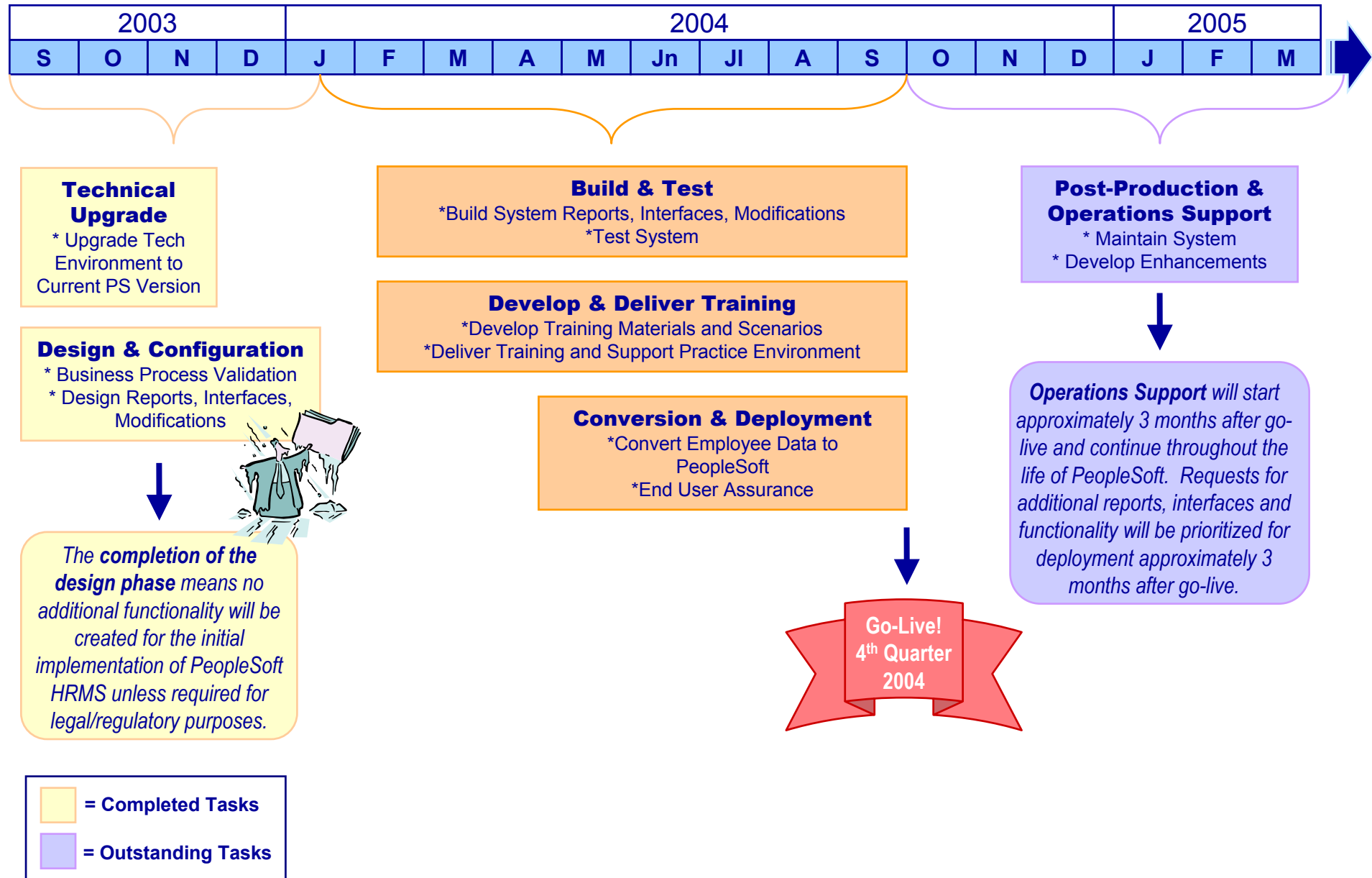
13 month- Phase I effort represents the replacement of several disparate legacy systems, and the development of the foundation upon which future HRMS processes and systems will be deployed

Phase II (To Be Determined)

- Benefits Administration to Providers
- Benefits Self-Service for New Hire, Open Enrollment and Maintenance
- FAHRIS Interface to PeopleSoft
(Other transactions -TBD)
- Time and Labor
- Managerial Self Service for Employee Maintenance (in Departments/Schools)
- Workflow Approvals

Phase II effort represents the building of additional HRMS process improvements and further integration across multiple sub-processes

PAC Phase I Timeline (2003-2005)



PAC Recent Accomplishments

- **Application & Process Design – Completed on 1/15/04**
 - ✓ Completed 47 Conversion Program Designs
 - ✓ Entered Configuration Data for 181 tables
 - ✓ Completed Systems Design
 - *66 Custom Reports*
 - *57 System Interfaces*
 - *23 On-Line Enhancements*

- **Change Management, Communications & Training Design - Completed 2/28/04**

- **Technical Infrastructure Design – Due 3/15/04 – To Be Complete 3/31/04**

- **Implementation Phase – Due 9/30/04**
 - ✓ Data Conversion Development in progress
 - ✓ Systems Development in progress – due 4/30/04
 - ✓ Test Planning & Scripting in progress – due 4/30/04
 - ✓ Parallel Test Planning in progress

Benefits of PeopleSoft HRMS Phase I

- 1. PIS, BIS and GEAC are combined in to a single source, University HRMS (Human Resource, Benefits and Payroll) system.**
 - Data entered once
 - Fewer hand-offs
 - All HRMS sources share the same data
- 2. Department Administrators enabled with direct access to the University HRMS system.**
 - View their employees' personal and employment data
 - Update employee demographical data directly into the system
 - Ability to create PAFs
- 3. Employees have the ability to update and/or view Human Resources, Payroll and Benefits data via the web.**
 - Update address, phone numbers, directory approvals and emergency contact data
 - Enter tax elections and direct deposit information
 - View and print paycheck information
 - View benefits enrollment information
- 4. Position Management utilized for Administrative and Academic positions.**
 - Administrative Staff - allows for unique position numbers for each job, providing knowledge of vacant and filled positions and position history
 - Academic Staff - provides ease of data entry
- 5. Use of Job Classifications and Job Families to aid in comparative studies for the Administrative Offices.**
 - University Rank Code structure replicated in PeopleSoft allowing continued precise differentiation of academic and administrative staff.
 - Classification of Administrative staff into job families enhances the ability to complete comparative studies while enabling Human Resources staff to better develop career paths at Columbia.



Benefits of PeopleSoft HRMS Phase I

Current System	PeopleSoft System
Data needs to be entered in both the HR and the payroll system, which can lead to differences in data between the systems and inaccurate paychecks	Data will be in one system, which improves data integrity leading to more accurate paychecks.
Benefit deductions are only fed to the payroll system once a month. This leads to missing or inappropriate benefit deductions on paychecks and extra time spent processing retro benefits.	Benefit deductions are in the same system as HR and payroll. Benefit deductions will be timely and accurate on the paychecks and fewer retro benefits will be necessary.
Department Administrators can only update data in the HR system by entering changes on the PAF form. Sometimes, it takes multiple weeks for the PAF form to cycle back to the DAs, which leads to long delays in updating employee's data in the HR system.	Department Administrators will be able to print PAF forms directly from the system, which will lead to faster turnaround on updating employee's data since they don't have to wait for the PAF to cycle back.
Department Administrators have to contact both the payroll and HR departments to see if data is entered in the system	Department Administrators will have direct access to a single source of entry for the University HRMS system. They will be able to view personal and employment data for their employees.
Employees are required to fill out a form to update direct deposit and tax information. Updates to the system may take numerous weeks.	Employees will be able to directly enter tax elections and direct deposit information in to the system making these updates immediate.
Paychecks are hard to decipher as some earnings and deductions are combined in to a single line.	Clearer earnings and deductions descriptions and better segmentation of paycheck items, such as pre and post tax deductions and employer-paid benefits, will make it easier to understand the paycheck.

FAHRIS/PeopleSoft Integration

Approach

- Continue to utilize the FAHRIS application for Hire and Rehire transactions for Faculty; use current process for Staff (using PeopleSoft)
- Modifying FAHRIS application to write Hire/Rehire transactions on real-time basis to PeopleSoft so all HR information stored in one database
- Modifications to FAHRIS will be mostly transparent to end-users
- Subsequent updates to employee data performed by viewing/printing PAF from PeopleSoft, updating via hardcopy PAF, and routing to CUMC HR or OFA
- Reporting for FAHRIS users will be consistent with current process of querying FAHRIS
- Reporting via PeopleSoft Self-Service and via Data Warehouse will also be available
- Users will have ability to inquire on all PAF and Nomination forms in FAHRIS

FAHRIS/PeopleSoft Integration

Rationale

- Ease of Use/No Training required to use FAHRIS application for Managerial Self Service
- FAHRIS HR information needs to integrate with CUMC-specific FPO & CPPN information
- Full PeopleSoft Managerial Self Services slated for future Phase II
- No disruption to FAHRIS end-users relative to current process
- Automates entry of Hire and Rehire information into the PeopleSoft database
- Even with different user interfaces (FAHRIS vs. PeopleSoft), HR information will be stored in one common database to ensure consistency and accuracy of HR information across Columbia University

How/ Where will I enter my HR transactions for CUMC?

Transactions	How/Where will transactions be made?
Hire/Rehire (Faculty)	<ul style="list-style-type: none"> •On-Line Via FAHRIS •Transmitted via real-time interface to PeopleSoft
Hire/Rehire (Staff)	<ul style="list-style-type: none"> •View/Print PAF from PeopleSoft •Update Manually •Route PAF to CUMC HR
Termination	<ul style="list-style-type: none"> •View/Print PAF from PeopleSoft •Update Manually •Route PAF to CUMC HR or OFA
Transfer	“”
Promotion	“”
Leave of Absence	“”
Resignation	“”
Retirement	“”
Layoff	“”
Pay Rate Change	“”
Position Change	“”
Suspension	“”
Recall from Suspension	“”

FAHRIS/PeopleSoft Reporting Approach

- Reports currently produced by FAHRIS will continue to be produced and distributed via FAHRIS
- Standard PeopleSoft Reports available via Manager Self Service
- Trained “Super User” HR Reporters will respond to requests for Ad-Hoc and Standard reports using Data Warehouse Reporting Tools or PeopleSoft Query Tool

	PeopleSoft	FAHRIS
Reports accessible via Manager Self Service	<ul style="list-style-type: none"> ▪ PeopleSoft Manager Self-Service PAF Department Payroll Register Department Earnings Register PAF Actions Report ▪ PeopleSoft Distributed Visa Expiration Appointment End Date 	<ul style="list-style-type: none"> ▪ FAHRIS Manager Self-Service HRIS Inquiry Record Expiring End Dates Report All Active CU Employees Report HRIS In-Process Record CU Nomination Form NYPH Nomination Form
Ad-Hoc/ Standard Report Requests	<ul style="list-style-type: none"> ▪ Report Request to HR “Super User” Reporter using PeopleSoft Query tool or Data Warehouse Analysis/Strategic Planning Reports Address/Email Lists Cross University Salary Planning Salary History Employee Informational Data 	<ul style="list-style-type: none"> ▪ Report Request to HR OFA Address/Email Lists Cross Medical Center AAMC FAMOUS Reports LCME Reports Gender Ethnicity Reports Salary Worksheets Zero Salary Rosters Annual Departmental Reports for Dean

PeopleSoft Employee and Manager Self Service Functionality

➤ PeopleSoft Phase I Self-Service functionality will be very similar with the addition of paycheck information, ability to update direct deposit information, update federal W-4 information and print Turnaround PAFs.

Self Service Functionality	PeopleSoft Audience & Access		Current Self-Service
	Employee	Manager	
Personal Information			
Addresses	Edit	Edit	Edit
Phone Numbers	Edit	Edit	Edit
Emergency Contacts	Edit	Edit	N/A
Email Address	View	View	Edit
Benefits Summary			
Benefit Plan Enrollment	View		View
Covered Dependent Information	View		View
Health, LTD and Life Benefits Coverage	View		View
Retirement Plan and Carrier Allocations	View		View
Tax Deferred Annuity (SRA) Contributions and Carrier Allocations	View		N/A
Payroll Summary			
Paycheck	Print		N/A
Direct Deposit	Edit		N/A
W4	Edit		N/A
Job Summary		View	View
PSYCHE Information		View	View
Interdisciplinary Affiliations		View	N/A
PAF and Nomination Form		Print	N/A
Turnaround PAF		Print	N/A

PAC Manager Self Service Training Approach

➤ Audience

- Departmental Administrators on all Columbia Campuses.

➤ Course

- Manager Self Service Course HRMS201
- Consists of six procedures:
 - Personal Information (*edit*)
 - Job Summary (*view*)
 - Psyche Information (*view*)
 - Interdisciplinary Affiliations (*view*)
 - PAF & Nomination Forms (*print*)
 - Turnaround PAF (*print*)
- Pre-requisite - user must be proficient with using a MS Windows personal computer (*Columbia offers free courses to employees on Using Personal Computers and Using MS Windows in Columbia Multimedia Learning Center on the second floor of Lewishon Hall.*)

➤ Materials

- Presented in a step-by-step guide.
- Provides the description and purpose of the procedure with step-by-step instructions and screen prints for completing the process, including the appropriate Columbia values to use for each situation.

PAC Manager Self Service Training Approach

➤ **Delivery**

- Self-study course that can be downloaded from the PAC web site and learned at your own pace, in your own environment.
- Learning Lab sessions (6 Morningside, 6 CUMC) where you can visit the training room to speak with an instructor or your HR Service Manager regarding the course or the new PAF Handbook. You can also use the time to walk-through the on-demand course while someone is present to help.
- Course will be available beginning on August 2, 2004. *DAs will need a valid UNI ID and Password to access the course download page.*

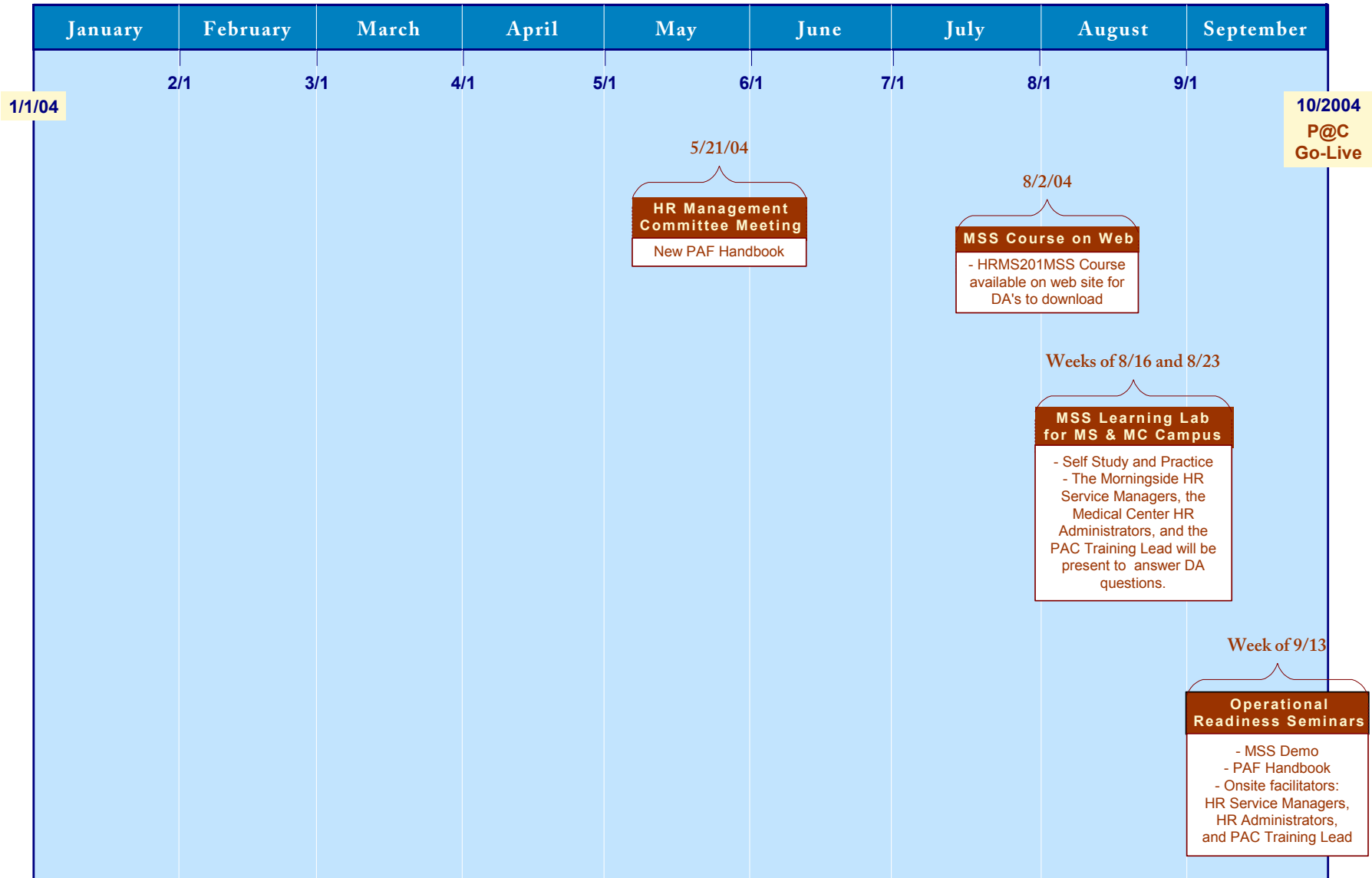
➤ **Skills Assessment**

- Short readiness assessment to download from the PAC web site and complete after taking the Manager Self Service course.
- Successful completion of the readiness assessment will provide assurance to DAs, and the project team, that they possess the required understanding of the application for the day one go-live environment.
- Upon completion of the readiness assessment, you will receive your User ID and Password to access the Practice database. *The readiness assessment must be passed to receive access to the new PeopleSoft application.*

➤ **Operational Readiness Seminar**

- Operational readiness seminar approximately 2 weeks before PeopleSoft go-live.
- Trainer will walk through the HRMS201 course and an HR Service Manager will discuss the new PAF Handbook.
- PAC project team will provide important go-live reminders.

PAC Manager Self Service Training Timeline



PAC University Feedback - FAQs

1. Will we be able to view Salary and Additional Compensation via self-service?

- You will be able to see salary information. You will not be able to see additional compensation information. However, you will be able to see additional compensation on the Department Payroll Register and the Department Earnings Register.

2. Will casual employees be maintained in PeopleSoft? If yes, how will they be converted and maintained?

- All employees currently active or terminated after 6/30/02, will be converted into PeopleSoft, including casual employees.
- No additional data is needed to convert the casual employees.
- Time for casual employees will be entered via FFE.

3. Will the Roster process change?

- The Roster process will remain the same for 0 Salary, Annual Recertification and Off-Cycle Rosters.
- Union Rosters will not exist. Departments/Schools will receive a communication noting the labor agreement increase amount and effective date.

4. Will all individuals with access to Manager Self-Service be able to view the Salary information for employees in his/her department?

- Yes, all individuals with access to Manager Self-Service will be able to view the Salary information of employees in his/her department.

5. Will the approval process change?

- No, the approval process will not change. Each school/department will continue to follow the same approval process as they do today.

PAC University Feedback - FAQs

6. Will we provide employee self-service communications in multiple languages?

- We will provide employee self-service communications/training material in English and Spanish.

7. How will position numbers be created in PeopleSoft? Will PeopleSoft maintain PRS, PRQ and shadow system position numbers?

- PeopleSoft position numbers are auto-generated for Administrative and Professional Library Positions.
- PeopleSoft position numbers are smartcoded for all other Academic Positions.
- PeopleSoft will not maintain PRS, PRQ or shadow system position numbers. If a school/department needs this information, they will need to maintain it in a separate system/process.

8. Have Unions been contacted regarding changes in the system?

- Labor Relations is working with the unions regarding changes to the central organization.
- The project team and labor relations will be meeting with each union to discuss changes that may impact union members.
- Project communications will be sent to employees regarding changes, such as employee self-service and the changes with direct deposit advices.

9. How will the project help support department administrators with faculty who are adverse to printing their own direct deposit advices?

- The Provost will send a communication to all faculty notifying them of the self-service aspect of viewing/printing their direct deposit advices.
- Palm cards will be created with instructions for accessing pay stubs and a description of changes to the pay stubs. Department Administrators will be able to distribute these palm cards in place of advices.

PAC University Feedback - FAQs

10. Can you describe the process to update employee data in the system?

- The Department Administrator will print the pre-populated Turnaround PAF for the employee.
- The DA will update the necessary information and send the Turnaround PAF through the appropriate approval process with Central Human Resources as its ultimate destination.
- Central Human Resources will update PeopleSoft with the information on the Turnaround PAF.
- The DA will look at the Job Summary information to verify the data was updated correctly. If the data is not correct, depending on the type of error, the DA may communicate with the Central Human Resources or print another Turnaround PAF and make the necessary changes.

11. Will Turnaround PAFs be sent to the department/school from Central Human Resources?

- No, Turnaround PAFs will not be sent from Central Human Resources to the department/school. DAs will have the ability to look on-line to verify changes and/or run the PAF Actions Report.

12. I inquired about a certain type of report to see if it could be provided via PeopleSoft. How can I find out the outcome?

- The PAC team has received many requests for reports. We needed to minimally replicate that which is still required out of the legacy HRMS systems, and we gained many more reports delivered from PeopleSoft. We also created some commonly requested reports which were needed by all departments.
- To learn the status of your particular report request, send an email to PAC@columbia.edu with the type of report requested and we will provide the status of its disposition.

How to Obtain Information on the PAC Project

1. E-Mail comments and questions to PAC@columbia.edu
2. View the Project Website for project information:
www.columbia.edu/cu/pac/
3. Contact the PAC Project Director or Communications Liaison
 - **Project Director: Lynne Gere**
 - (212) 851-2912
 - lg2193@columbia.edu
 - **Communications Liaison: Joseph Harney**
 - (212) 854-1540
 - jh2087@columbia.edu