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Changes coming to POI, Transfer ePAR forms in April [1]

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Teams continue making progress on upcoming HCM changes. SmartERP ePAR forms including Person of Interest, Transfer, Hire, Rehire and Additional Job will be removed in two stages this year, in favor of delivered PeopleSoft functionality.

Why are changes being made?

This work is being done to ensure user pain points are addressed and that HCM remains in compliance with Oracle for updates and patches.

Highlights of upcoming POI and Transfer changes:

POI

- New controls will be added so a POI record cannot be created for an individual who has been terminated from the university as **not eligible for rehire**.
- A POI's sponsor will be more accurately captured. Currently, the last person who edits the POI's record is noted as the sponsor, which is not always accurate. With this addition, the POI's sponsor will be noted by the position the sponsor is fulfilling.
- A Social Security number will not be a required field on the POI form. From a business process standpoint, Social Security numbers will be required for certain POI types including Pre-employment, Security Access or Summer Employment Gap POI types.
- The Planned Exit Date will default to one year from the POI creation date. With this update, it can be changed up to five years from the current date.

Transfer

- The department that is gaining the transferred employee will initiate the transaction. The request to release the employee will no longer be needed, as the gaining department will be able to see the employee who is transferring in the system.
- The **Compensation Rate** field will include validation logic based on pay frequency to prevent data entry errors.
- A new **Related Content** feature will be available throughout the Transfer transaction, allowing users to view relevant information. For example, when transaction details are entered, the current job information for the employee being transferred can be viewed as read-only. This will allow the user to determine the correct employment record.

  When associating the position an employee is transferring into, the related content button will show the position summary information (effective date, action reason, status, active head count and budgeted). Position funding information will also be viewable.
- When a transfer transaction is entered, a transferring employee will receive an email

notification including steps they must complete with the PPL in their current department to ensure a smooth transition.
- The contract transfer process will be streamlined and simplified to default values and prevent data entry errors.

Project timeline

Project groundwork and user education will take place until March, with training to follow. After the groundwork is complete, changes will be implemented in **two releases throughout the year** in an effort to prevent disruption to business operations.

February and March

- Demos and communications will be provided to users.

April

- Training will be available from **March 31 to April 12**.
- The release of POI and Transfer changes will launch on **April 14**.

Later in 2018

- The release of Hire (direct hires, ATS hires, contract hires), Rehire (direct rehires, ATS rehires, contract rehires), and Additional Job changes will launch.

How are we ensuring a high-quality solution is delivered?

User Acceptance Testing (UAT)
User acceptance testing is a crucial part of ensuring the technical solution meets the requirements identified by the cross-campus project team. UAT includes representation from each campus, ensuring comprehensive, real-world scenarios are thoroughly tested and approved before updates launch to campus users.

Change management
In addition to the improved approach to UAT, this project also employs a formal organizational change management (OCM) approach. OCM's goal is to connect the changes occurring in HCM to what users do in their job and ensure they are prepared for the changes. The HCM Change Agent Network [3] will ensure messages are provided to all affected HCM users, and users will notice more touch points from the team as the project moves forward.

Training
Webinars will be made available to help users understand changes to POI and Transfer. From **March 31 to April 12**, training will be provided by subject matter experts on each campus. HCM Systems Team members will attend to answer any technical questions users may have.

When will remaining ePAR forms transition to delivered functionality?

Chief Human Resources Officers (CHROs) from each campus reviewed priorities and made the decision to address other technology needs ahead of additional changes to remaining ePAR forms. This choice was made because remaining ePARs are considered stable and do not negatively affect HR operations.

More information will be available soon

More information is on the way. Be on the lookout for invitations to town halls, webinars, and training session schedules.

HCM development [4], ePAR [5], POI [6], Person of Interest [7], Transfer [8], Hire [9], Rehire [10], Additional Job [11], HCM project [12], Wave 3b [13]

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