**Temporary Appointment Process – ‘AS IS’**

**START**
- Check Funding
- Verify Position & Person has PEAEMPL Record
- Validate Current Application on file WORKforUM

**App On file?**
- YES:
  - Create Personnel Appt Form
  - Hand Off
- NO:
  - Contact Candidate Complete App.

**New Temp Staff Hires – Originator verify application in WorkForum and inform candidate to:**
1. Verify email address on application current
2. Look for an email from UofM about information to initiate the background check

**Validate Current Application on file WORKforUM**

**Finance Level 10**
- Financial Mgr/Designee
- Chair/Department Head

**Finance Level 20**
- Dean/AVP

**2nd Level Apprv**
- Finance Level 10
- Financial Mgr/Designee
- Chair/Department Head

**Approve/Ret Corr/ Deny Personnel Appt Form**
- NEED 2nd Level Apprv?
- YES
- Hand Off
- NO

**Route Signature**
- Make copy & Deliver Form to HR
- Personnel Action Form
- Hand Off
- Go To P2 A

**Candidate**
- P1
- P11
- P13
- P19
- P21

**Finance Level 10**
- Financial Mgr/Designee
- Chair/Department Head

**Candidate has 3 days to complete / fail to comply HR has to initiate process again**

**NOTE:** After contract is completed, candidate will be notified to initiate I9 process

**Hand Off**
Service Center Logs into Banner to Validate:
Position Number
Look for current & previous job records
Conflicting eClass
Look up department org & write on form

Note:
Temp employees can only hold multiple temporary assignments and or a part-time faculty assignments. Emp employee can only be a TH, TE or PF eClass.

Call Candidate to confirm start date & if they accept the appointment
Shred Appointment Form
Email Originator

New Hire
Make Copy of Appt Form
Deliver Orig Form Data Mgmt
Personnel Action Form Hand Off
Email Candidate Orientation Information
Deliver Copy Form to HR Partner
Include information on I9 certification and documents needed

Review Start Date Personnel Action Form
Personnel Action Form
Go To P4 I
Go To P4 J
Go To P4 K
Go To P4 L
Go To P4 M
Go To P4 N
Go To P4 O
Go To P4 P
Go To P4 Q
Go To P4 R
Go To P4 S
Go To P4 T
Go To P4 U
Go To P4 V
Go To P4 W
Go To P4 X
Go To P4 Y
Go To P4 Z

HR Service Center
Log Appointment Form Received
Validate Have Application WORKforum
Application On file?
Validate Candidate Information HR Banner
Conflicting Job Records?
YES
NO
Email Originator to contact Candidate
Email Originator – one Appt has to be cancelled
Cancel?
YES
NO
Go To P4 B
Shred appt form if cancel

Personnel Action Form
Create Folder with Candidate documents for Orientation - hand off to HR Trainer
Hand Off

Review Start Date Personnel Action Form
Personnel Action Form
Personnel Appt Form (copy)
Personnel Appt Form (copy)
Personnel Appt Form (copy)
Temporary Appointment Process – ‘AS IS’

Validate: Correct eclass (TP or TE) Correct org Are there any conflicting active job records

UUID Activated based on Current Hire Date

Email Originator For Corrections

Validated PPAIDEN Form
Create/Update PEAMEPL
Validate PNBABUD Org
Research any Active NBAJOBS Records
Conflicting Jobs?
NO

Load NBAJOBS Record
Scan OnBase

Stop

From P2 J
From P2 F
From P2 B
From P3 G
From P3 T
From P3 M

From P2
From P3
From P3
From P3
From P3
Pains & Issues:

Please Read First:
The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The issue is numbered and its Root Cause Analysis is in red text, preceded by RCA prefix.

1. Process is paper.
   RCA: No electronic process in place.

2. Review/validating the appointment forms.
   RCA: Task is time consuming for HR Service Center, HR Partner and HR Data Management.

3. Department unaware location of form during process. Paper forms lost, therefore process has to start over.
   RCA: There isn't a shared tracking process in place.

4. Departments use excel log sheets to track appointment form.
   RCA: There isn't a central tracking system.

5. Appointment form has incorrect or missing information: ex: position number, job description or SOC code.
   RCA: Paper process, rely on originators to validate information before submission.

6. One Time Pay appointments, currently following the appointment process for temporary employees.
   RCA: Lack of departmental standardized procedures for one time pay.

7. Several active appointments from multiple departments. Manual monitoring by HR to determine if employee is insurance eligible.
   RCA: There isn't a centralized system for tracking contracts.

8. Multiple contracts for single position, each one has different pay rate, with multiple timesheets, can create incorrect payments.
   RCA: This is a common procedure, requires a payroll adjustment timesheet.

9. Several handoff (13).
   RCA: Form is processed multiple times by HR departments.

10. Timesheet not available first day of work (new and reappointments) departments not aware when timesheet is available.
    RCA: Timing between contract fully executed and job record created.

11. TN retirees are not always indicate correctly on the appointment form.
    RCA: Appointee does not indicate to originator.

12. Editing Longevity date to 01-01-1999, not a recommended best practice to use baseline fields for other purposes.
    RCA: Data Management using the field for other auditing objectives.

13. Candidates starts prior to approval dates on contract.
    RCA: Department do not wait for official notification ready to work, university out of Federal compliance.

    RCA: Departments allowed to create own job descriptions.
RCA: There isn’t an electronic contract.

16. Departments maintain copies in their offices, against HR procedures.  
RCA: There isn’t electronic contract.

17. Temporary employee becomes benefit eligible. Original contracts imitated with incorrect eclass.  
RCA: Data is not easily accessible to departments.

18. HR departments use excel log sheets to track appointment form.  
RCA: There isn’t a central tracking system.

19. Departments unaware candidate has current eclass appointment and submit a student or temp appointment form.  
RCA: Employee cannot have an active student and temporary eclass jobs.

20. Department originators understanding of payroll vs service dates (personnel date in Banner) when creating contracts.  
RCA: Lack of reviewing of training materials.

21. Candidate does not review terms of contract prior to employee orientation.  
RCA: Information provided prior to orientation is reviewed or followed.

22. Late submission of contracts causing frustrations with process.  
RCA: Departments request immediate hires. Cut off dates are not enforced.

23. Contract is not fully vetted until received in HR Data Management office.  
RCA: Early error detections are not in place, ex: eclass, org, position, org.

24. Retro payments.  
RCA: Departments not meeting payroll cutoff dates.
## Analysis of the ‘AS IS’ process

1. Are all roles essential? What roles could be considered to be eliminated?  
   HR Director/AVP approval

2. What is the number of hand-offs?  
   13

3. Are any steps automated?  
   No

4. What steps can be eliminated or automated?  
   Automate approvals by creating an electronic approval workflow process

5. What tasks consume the greatest amount of time?  
   Validating Banner data ex: position, FOPAL, job records

6. Does each task add value?  
   Yes, but needs to be streamlined

7. What steps/process should be added?  
   None

8. Iterations (how many times is process repeated in a timeframe)?  
   Daily

9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.)  
   15-20%

10. % FTE and/or estimate time takes for each key role in the process.  
    - Service Ctr – 40%  
    - HR Partner – 40%  
    - HR Data Management – 15%  
    - HR Dir/AVP – 2 hours week

11. Metrics – identify measurable outcomes (estimate time for manual steps, making copies, tracking, communications (email & calling), Banner review, walk form dept to dept, approvals, return for correction).  
    Identify current time spent on task for roles: estimated 1,066 forms processed 2019  
    (estimated annual hours worked 1950 hours – 13 holidays – average 3 weeks vac = 1740 work hours)

    - Originator – Communications, completing forms, follow-up, tracking – 1.5 hours @ 1066 = 1,599 hours annually
    - Service Center – 1740 work hours @ 40% = 696 hours annually
    - HR Partner – 1740 work hours @ 40% = 696 hours annually
    - HR/AVP - 2 hours a week @ 1066 forms = 2,132 hours annually
    - HR Data Management – 1740 work hours @ 15% = 160 hours annually

    Total estimated staff hours for temporary employee appointment process = 5,283 hours
Note: On revisions some departments do not send form back to faculty for signature

Penultimate Semester: Contact faculty advisor for names of honors students

Process begins after the interview process and section to hire has been made

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment