1. Assessment Plan - Four Column

PIE - Administrative Services: Payroll Unit

Where We Are Now: Analysis and Summary

2018-19

Contact Person: Richard Lee
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External Conditions, Trends, or Impacts (Student Services): The new Student Centered Funding Formula will be a huge challenge for Payroll given that the College won't know its realized portion of any COLA until the end of the fiscal year.

Internal Conditions, Trends, or Impacts (Student Services): One Payroll staff member was promoted to another department.
Critical Decisions Made by Unit: The Payroll Department along with Technical Services decided to go-live with Workforce Software in June 2019.
Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources: Went live with Workforce Software in June 2019. Successfully acclimated to Banner 9.
Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration: Expanded a pilot program to go live with the new APEX hourly web timesheets.
Contributors to the Report: Richard Lee, Amy Cheung, Lakshimi Fontecha, Evelyn Ramirez, Ron Titus

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans
Time and Leave Reporting Enhancements (IT/Payroll) - The Banner system has web time and leave reporting functionalities, however, there are numerous inadequacies with both. Our goal is to utilize an alternative method of collecting and maintaining this important data while at the same time improving efficiency of the overall process as well as the accuracy of the data maintained. **Status:** Active	**Report directly on Goal**	**Reporting Year:** 2018-19 **% Completed:** 75 With the implementation of Workforce in June, continual progress is being made to improve the system functionality. Thus far, it is a vast improvement over the Banner time keeping system. (07/08/2019)
	In Progress - Using Oracle's APEX (Application Express) software, create a web-based time reporting system and database from scratch, that mimics the way the current paper time sheets are completed, submitted, and routed for approval	

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans

Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19
Goal Entered: 06/14/2016

without the constraints of the Banner web time sheet system.
Describe Plans & Activities Supported (Justification of Need): IT programmer(s) to build and script the program.
Lead: Richard Lee (Payroll)
What would success look like and how would you measure it?: We can measure the success of this project by counting the number of paper time sheets we process each month. Currently, that number hovers between 1,000 and 1,500.
Type of Request: IT SUPPORT: Requests for projects related to the implementation, integration, application, delivery, and support of information and instructional technologies.
Planning Unit Priority: High
Documentation Attached?: Yes
One-Time Funding Requested (if applicable): 0
Related Documents:
[APEX Short Term Hourly Time Sheet Project.pdf](#)

Customer Service - To provide excellent customer service to the campus community.
Status: Active
Goal Year(s): 2015-16, 2016-17, 2017-18, 2018-19
Goal Entered: 06/30/2015

Report directly on Goal

Reporting Year: 2018-19
% Completed: 100
With the implementation of Workforce Time and Attendance system, employees can now see real time leave balances, which has been an ongoing request and something that was not possible with our previous system. (06/03/2019)

In Progress - Modify Payroll Department's service window.
Describe Plans & Activities Supported (Justification of Need): Funds and Project Manager to

replace the front counter window with a sliding window similar to Human Resources. The front desk at the window will also need to be modified so that the reach from the desk's sitting area to the sliding window is not too distant and hopefully avoiding the need to stand up each time someone comes to the window. Our intent is to keep the sliding window closed when no customers are present to reduce hallway noise coming into the office. We have not received an official estimate for the cost of such alterations, but entering $30,000 in the field below allows me to submit this request.

Lead: Roger Sneed or other Project Manager

Type of Request: FACILITIES: This section includes minor building improvement projects and alterations to specific rooms or operational areas.

Planning Unit Priority: Medium
Documentation Attached?: No
One-Time Funding Requested (if applicable): 30000

In Progress - The Payroll Department has an ongoing need for one student hourly position. With the use of the new OnBase document imaging system, more time and attention is needed in order to scan and index all of our various forms and time sheets. This task is best suited for a student worker or other hourly position. In the past, the Work Study program was utilized to fill our

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans

hourly support needs. However, the pool of talent in the Work Study program over the years has been inconsistent and sometimes unreliable. Having dedicated funds for this support would allow us to select the best candidate for the job and hopefully retain them for longer than a semester.

Describe Plans & Activities Supported (Justification of Need): Ongoing Student Hourly Support

Lead: Richard Lee

Type of Request: STAFFING: Requests for permanent employee positions or temporary/hourly employees.

Planning Unit Priority: Medium

Documentation Attached?: No

One-Time Funding Requested (if applicable): 10000

On-Going Funding Requested (if applicable): 10000

In Progress - A need has arisen to hire one additional full-time permanent position within the Payroll Department. This position would be an Administrative Assistant I and would be responsible to working at our front counter window. Currently, the Payroll staff rotate manning the front counter on a daily basis. Over the past few years, they have encountered the following issues: 1) They are often interrupted by visitors looking for the Bursar's Office or Fiscal Services window looking to pay fees or those looking for the restrooms. This can be especially concerning when they are in the midst of auditing time

sheets or entering payroll into Banner. 2) Each day they are assigned to work the front counter they must "bring their entire desk" with them, meaning all of the time sheets, W4/DE-4's, direct deposit authorizations, folders containing payroll adjustments, etc. they will be working on for the day. 3) There are concerns with hygiene having to share the keyboard and mouse with fellow staff as well as having to reposition workstation equipment (chair, monitors, keyboard) so that they meet their ergonomic needs for the day. Having a dedicated person work at the front counter would enable the existing Payroll staff to focus on their work, especially during busy payroll and audit days as well as provide backup/backfill in the event of leaves or separations.

Describe Plans & Activities Supported (Justification of Need): One (1) new 100% Administrative Assistant I position

Lead: Richard lee

Type of Request: STAFFING: Requests for permanent employee positions or temporary/hourly employees.

Planning Unit Priority: High

Documentation Attached?: No

On-Going Funding Requested (if applicable): 72500

Request - Full Funding Requested - New position (1 FTE) "Payroll Specialist"

Describe Plans & Activities Supported (Justification of Need): The College now directly reports its

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans
	monthly retirement files to CalPERS and CalSTRS. While this is better for the College in the sense it can now control the accuracy of the data being reported, it did create an additional workload burden. A new "Payroll Specialist" position would allow this additional workload to be absorbed as well as relieving current staff from doing time-consuming tasks that add little value overall to the College such as: verifications of employment, CalPERS service credit purchase requests, CalSTRS Express Benefit forms, Employment Development Department benefit audits, Metlife withdrawal requests just to name a few. This new position would also serve as a second layer of redundancy for the processing of our 3 monthly payroll cycles (first layer being the Payroll Coordinator). **Lead:** Richard Lee **What would success look like and how would you measure it?:** Hiring a new Payroll Specialist. **Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees. **Planning Unit Priority:** High **Documentation Attached?:** No **On-Going Funding Requested (if applicable):** 93097	
Implement New Technologies - The Payroll Department is always searching for ways to improve efficiencies in our processes through the adoption of new technologies.	Report directly on Goal **Completed -** The College has a need	**Reporting Year:** 2018-19 **% Completed:** 100 The implementation of Workforce was a major upgrade. (09/13/2019)

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans
Status: Active **Goal Year(s):** 2015-16, 2016-17, 2017-18, 2018-19 **Goal Entered:** 06/30/2015	to comply with the Employer Mandate provisions of the Patient Protection and Affordable Care Act of 2010 (commonly referred to as Obamacare or ACA). This requires the College to track and maintain hours for all employees to determine ACA eligibility for health insurance. The College must also issue Forms 1095-C to employees each January and submit an electronic file with the same data to the IRS each year. The Worxtime service allows the College to more easily identify those employees who should be offered health coverage and also creates and distributes a Form 1095-C to each eligible employees as well as transmits the required data to the IRS. **Describe Plans & Activities Supported (Justification of Need):** AFComply (formerly Worxtime) Affordable Care Act (ACA) Compliance Service **Lead:** Richard Lee **Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD. **Planning Unit Priority:** High **Documentation Attached?:** No **On-Going Funding Requested (if applicable):** 40000 **Request - Full Funding Requested -** Annual maintenance for Payroll Copy	

Machine

Describe Plans & Activities Supported (Justification of Need): Funds were previously provided to purchase a copy machine in Payroll but ongoing funds for maintenance were not approved. We are requesting an increase in ongoing funds for the annual maintenance agreement that includes all parts, labor, and toner for the copy machine in Payroll office.

Type of Request: OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD.

Planning Unit Priority: High

On-Going Funding Requested (if applicable): 1000

Implement Workforce Timekeeping Software - In coordination with Technical Services and Information Technology, implement Workforce software to replace the Banner leave reporting timesheets for Classified staff.

Status: Active

Goal Year(s): 2018-19

Goal Entered: 06/30/2018

Report directly on Goal

Reporting Year: 2018-19

% Completed: 100

WorkForce Time and Attendance went live on June 1st for all Managers, Confidential, and Classified Staff and has replaced the following timekeeping systems and processes:

- Banner web timesheets for classified/confidential staff
- Paper overtime/comp-time timesheets
- Kronos timesheets currently used by the Facilities Department
- Paper management absence forms

As with any new implementation there have been some challenges and we will continue to evaluate the system and how best to utilize it. There are several advantages that WorkForce offers including:

Unit Goals	Resources Needed	Where We Make an Impact: Closing the Loop on Goals and Plans
	Report directly on Goal	• Real-time leave balances (leave balances are updated immediately, not when timesheets are approved by all approvers) • Future leave balance projections (future leave accruals and time-off requests can be easily visualized on a graph) • Time-off requests will automatically populate onto the timesheet • Holidays will automatically populate onto the timesheet • Work schedules, when used, will automatically populate regular hours onto the timesheet • Timesheet Corrections (approved timesheets can later be corrected, even after they've been processed) (06/01/2019)
	Request - Partial Funding Requested - Ongoing funding to support the annual license fees for employees using the Workforce timesheets. Ongoing funding of $50k has already been set aside for Kronos timesheets, however, these timesheets were never fully utilized due to their limitations. My hope is that Kronos will be replaced by Workforce and that the $50k funding can be used to support Workforce license fees. **Describe Plans & Activities Supported (Justification of Need):** Workforce will replace all of the Banner leave reporting timesheets currently used by the classified staff (approx. 500) and potentially all Kronos timesheets (approx. 100). **Lead:** Richard Lee **What would success look like and how would you measure it?:** Replacing all Banner leave reporting timesheets with Workforce.	

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	Type of Request: IT SUPPORT: Requests for projects related to the implementation, integration, application, delivery, and support of information and instructional technologies. **Planning Unit Priority:** High **Documentation Attached?:** No **On-Going Funding Requested (if applicable):** 15000	