On/Off Boarding
Innovation Committee
Recommendations
09/30/2021
Thanks for your support!

- OIT Executive Leadership Team
- Innovation Committee Sponsor
- Innovation Committee Co-Chairs
- DAS HRD and all agency HR team members
- DAS Lean Ohio *(Special thanks for all those process mapping hours!)*
- OIT Service Areas – IOP, O365, CSC, IT Desktop, VoIP and Service Now
- Innovation Committee members
- Agency IT team members
- Survey Participants
Scope

- Onboarding Processes: (State Employee) New hire, Transfer and Rehire
- Offboarding Processes: (State Employee) Retirement and Immediate Termination
- Analyses on Policy, Process, Procedure, Technology Solutions and Data

Enterprise

OAKS
- HR creates Electronic Personnel Action Request (ePar) for employee
- HR approves ePar

IOP
- Receive ePar action
- Create Active Directory (AD) account

O365
- Generate Mailbox
- Apply O365 product licenses based on agency template

Agency

Equipment provisioning
- Workstation
- Phone
- Other necessities
DAS HRD – Reissue inter-agency transfer memo

Requesting Agency to notify the releasing agency of the transfer a pay period in advance. This communication with the releasing agency is to occur outside of OAKS HCM, in addition to ePar system workflow.

Rationale: DAS HRD issued the original memo in 2014. Re-releasing will create awareness with HR personnel in agencies that have come on board since. Additionally, the memo will include above process updates that were not part of the original memo.

Requesting agency (agency the employee is going to), Releasing agency (agency the employee is leaving from)
Process Improvement

Innovate Ohio Platform (IOP) – Modify Rehire process

Activate Active Directory (AD) account creation prior to employee start date
Create new AD account and disable old account

Rationale: “Heavy lifting” prior to employee start date
More time on hand to act, if issues arise during the process
New AD account eliminates issues from “left over” settings in old account

These improvements along with few other enhancements are scheduled for implementation in upcoming IOP release(s)
O365/Agency – Automatic mailbox provisioning

Agency: Opt for automatic mailbox provisioning, if you are currently subscribing to manual provisioning.

If there is a need to distinguish the type of mailbox, leverage “unique” attribute suited for your agency specific needs.

Rationale: Data analysis revealed mailbox is typically provisioned on day 0 or day 1 of employee start date when “auto provisioning” is set.

Auto provisioning eliminates delays, since it does not have to wait for the manual trigger from the agency.

Auto provisioning can significantly improve the overall process time, when there are no process errors introduced by other onboarding issues.
Process Improvement

Agency – Two-Tiered Notification

**Tier 1 Notification**: Notification sent to relevant teams on **position** approval. This notification enables the teams to secure necessary equipment (Desktop/Laptop, Phone)

**Tier 2 Notification**: Sent out when the **person** is scheduled to start. Typically, during the ePar approval

Rationale: Process analysis revealed agency IT teams do not always get 2 weeks lead time prior to employee start date in order to get the workstation and phone ready

Tier 1 notice eliminates this delay even when Tier 2 notice is sent out within a week of start date

The two-tiered notification can be implemented as part of Service Now workflow or any other technology workflows. Other improvements to reduce delays include, surplus inventory, reserve phone lines and monthly touchpoints between HR & IT
CSC/Agency – Onboarding Issue Escalation

Customer Service Center (CSC) escalation process updated to include Onboarding issues. Criteria for escalation: OH|ID Provisioning, AD provisioning, Access to myOhio.gov, Mailbox provisioning

Ticket template created to include information required for efficient analysis and resolution

Rationale: Onboarding issues were not integrated with escalation process, so the regular priority is P4, for which resolution period is 7 business days

Escalation sets priority at P2, for which resolution period is 24 hours

Agencies can escalate issues to CSC on or after the morning of the employee start date

Out of scope: HR process related issues and “white glove” process which relates to onboarding agency senior leadership are not included in this process
Process Improvement

Agency – Offboarding Procedure

Create and maintain a robust offboarding procedure that addresses all offboarding scenario

Rationale: DAS has an Offboarding procedure. During discussions with agencies, it has been noted, not all have an officially documented Offboarding procedure

Having this procedure in place, will help clarify agency responsibilities vs DAS responsibilities in deactivating licenses and accounts

Conduct an annual or semi-annual touchpoint with process stakeholders from HR, Business and IT to review offboarded employees and their accounts for deactivation. Benefits include security, cost savings and audit clearance
Looking to the Future…

As these process improvements become part of the solution/workflow, we should be able to see and measure the collective efficiencies:

- Collect the data in 6 months, to analyze and compare with the chart on the right

- Retrieve CSC tickets with Onboarding issues for review and further analysis

Eight months of Onboarding data (08/2020 – 03/2021)
Appendix

Reference slides:
• Rehire Process – Future State
• CSC Escalation
• Ticket Template
• White Glove Process Parameters
CSC Escalation for Onboarding Issues

Start

- Receive request in ServiceNow Portal
- Ensure that request meets escalation criteria
- Call CSC to escalate

CSC

- Inform customer that ticket does not qualify for escalation
- Create an incident ticket with High Priority (PO) 24-hour SLA
- Assign ticket to CSSE team

CSSE

- Conduct triage
- Receive and review request from CSC

ITP

- Assign incident ticket to be resolved
- Assigned incident resolved until resolved

End
CSC Onboarding Issue Ticket Template

Title/Subject (Examples):
• O365 Incident Ticket request for Onboarding Issue
• O365 Incident Ticket: Onboarding Rehire Issue
• O365 Incident Ticket for Offboarding Issue

RITM Number:

Escalation Contact in DAS/OIT:

Who is impacted:
• Employee OH|ID, Name

Issue Description:
• Refer to the criteria that triggered escalation (Ex: Mailbox provisioning)
• Describe the issue and provide pertinent details helpful towards resolution
• Include all previous resolution efforts and history to assist with triage and problem resolution

Best Practice to consider while creating a ticket
• If all employees experience the same issue, create a single ticket and list the employees
• If different issues are noticed, create a separate ticket per issue
• This will help ticket assignment to various teams
White Glove Process Parameters

Onboarding certain higher officials require special care and attention throughout service delivery and this is characterized as the white glove process.

- Applicable to senior agency leadership (Director, C-Suite Executives)
- Communication with OIT Service teams is through the chain of command and happens via phone/email/chat messages
- Tickets are not created in Service Now due to the confidential nature of the process
- Bottom line – who falls under white glove process is left to the discretion of OIT and agency leadership teams