WiTS Strategy Council Meeting
July 20, 2016 10:00a-11:30a
East Jefferson 6th Floor Conference Room and Web Attendance
Meeting Minutes

Attendance:

<table>
<thead>
<tr>
<th>Name</th>
<th>Division/Branch Office</th>
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<tbody>
<tr>
<td>Debbie Breedlove</td>
<td>CSD/Branch A</td>
<td>Sandra Munoz-Cintron</td>
<td>CSD/IOOB GRU</td>
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<tr>
<td>Karen Harris</td>
<td>CSD/Branch B</td>
<td>Saim Kinsella</td>
<td>CSD/IOOB GRU</td>
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<td>William Bryan</td>
<td>CSD/Branch C</td>
<td>John Mays</td>
<td>CSD/IOOB/CU</td>
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<td>Jennifer Wilcox</td>
<td>CSD/Branch C</td>
<td>Aurelie Eggert</td>
<td>CSD/IOOB IOU</td>
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<td>LaVonne Lewis</td>
<td>CSD/Branch D</td>
<td>Daniel Couturier</td>
<td>WSDD/NIHTC</td>
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<td>Maretta Plater</td>
<td>CSD/Branch E</td>
<td>Allison Kruszewski</td>
<td>OIMP</td>
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<tr>
<td>Maryann Postorino</td>
<td>CSD/Branch F</td>
<td>Jessica Watson</td>
<td>OIMP/ASB</td>
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<td>Angela Davis</td>
<td>CSD/Branch F</td>
<td>Jean Wartonick</td>
<td>OIMP/RMB</td>
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<td>Sara Valenzuela</td>
<td>CSD/Branch G</td>
<td>Meghan Lloyd</td>
<td>DSSEM</td>
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<td>Rainey Chambers</td>
<td>CSD/Branch G</td>
<td>Wendy Winter</td>
<td>CPD</td>
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<td>Patrick Campion</td>
<td>CSD/Branch H</td>
<td>Stacie Rappaport</td>
<td>HR SAID/Customer Care Branch</td>
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<td>Kierra Kenion</td>
<td>CSD/Branch I</td>
<td>David Barnhart</td>
<td>HR SAID/HR Systems Solutions</td>
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<td>Lisa Stevens</td>
<td>CSD/Branch J</td>
<td>Rahul Datta</td>
<td>WiTS Team</td>
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<td>Douglas Bruno</td>
<td>CSD/Branch J</td>
<td>Kim Rivera</td>
<td>WiTS Team</td>
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<td>Stephanie Jackson</td>
<td>WRD/BPLB</td>
<td>Negy Afshar</td>
<td>WiTS Team</td>
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<td>Thomas Brown</td>
<td>WRD/BPLB</td>
<td>Sam Lubel</td>
<td>WiTS Team</td>
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<td>Patrick McGrady</td>
<td>WRD/ER/LR</td>
<td>Terrye Verge</td>
<td>WiTS Team</td>
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<td>Jaime Arreguin-Avila</td>
<td>CSD/IOOB DEU</td>
<td>Phil Day</td>
<td>HR SAID Leadership</td>
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<td>Jeff Middlebrooks</td>
<td>CSD/IOOB DEU</td>
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Not Represented: WSDD/WEB, OIMP/EDB

I. Welcome

- Sam welcomed the group and thanked everyone for attending.
- Terrye introduced the WiTS Strategy Council (WiSC), the new identify of the former Super Users. As the WiTS Team has reduced some of the more routine maintenance tasks that were previously asked of Super Users, such as eliminating the submission of requests to add/modify Admin Codes in the WiTS database by automating the process via system interface, opening the Data Correction Request submission process to all WiTS customers (while still including a SU review piece), providing our HR Systems Support customers with direct access to their ticket request histories and hopefully reducing the amount of SU guidance needed to troubleshoot system issues, etc., the role of the WiTS SU is now able to evolve into more of an advisory one in which the WiTS Project Team can now work with the group on a more strategic level.
- Rahul Datta introduced himself as the newest addition to the WiTS Team. Rahul joins the NIH from the Social Security Administration, and is the WiTS Project Team’s new Technical Specialist.

We encourage you to share (via email or at staff meetings) any applicable information that you obtain from our WiSC meetings.
II. Updates

• Major Work Completed

  • Modification to the Prep for New Hire Email (07/06/2016)
    Kim explained to the group that as explained in a notice sent out on July 6th from the WiTS Project Team, a new call to action line for AO’s has been added to the Prep for New Hire email to ensure that information in WiTS and NED match. The line reads, “If the information you will be entering into NED (Appointee Name, Admin Code, and/or Scheduled EOD Date) does not match what is provided in the below table, or if you have additional questions, or need more information, please contact your HR Specialist, <Name of specialist>.”

  • NIHTC Class Offering workflow (06/30/2016)
    Sam announced that the NIH Training Center (NIHTC) Class Offering workflow was launched on June 30th. This new workflow is used to track class offerings that are managed, approved and coordinated by the NIHTC. All members of NIHTC have been granted access and many have already begun entering class offerings.

  • Enhancement to the Pathways Program Ending Reminder Email (06/16/2016)
    Kim informed the group that as of June 16th the WiTS Project Team updated the reminder emails for Pathways students who are nearing their expected conversion date. This reminder email will be sent to the Supervisor of the Pathways employee, GRU (Branch Chief, TL and HRS), AO, and the Servicing TL both 45 and 60 days prior to the expected program completion date. This email now includes a list of all the documents needed in the conversion file and who to contact if not converting. Kim also clarified that this reminder only applies to Recent Grads and PMFs because PMF’s and Recent Grads have to be converted or not converted by a specific date (2 years after appointment for PMF’s and 1 year after appointment for Recent Grads). We are still working with then GRU to determine a way include Pathways interns, as their conversion date can vary greatly depending on graduation date.

    Terrye mentioned the fact that unlike other WiTS reminder emails that simply advise the IC contact to ‘take whatever action is necessary’, this email outlines a list specific documents that need to be submitted and who to contact if they are not converting the employee. The WiSC agreed that we should be moving toward these types of notifications in the future so that the email can be more useful.

    ➢ WiTS Team Action Item: The WiTS Team will work with WiSC on which emails should be reviewed for the possibility of including additional, specific information to IC customers and WiSC will assist in determining the guidance to be included.

  • WiTS Historical Information Available on HRSS/HRSA (06/06/2016)
    Negy announced that on June 6th a new ‘Request History’ link was added to both the HR Systems Access (HRSA) and HR Systems Support (HRSS) forms to allow users to view historical information regarding support and access tickets. The HRSS Request History provides details of all support requests that have been submitted for the requisitor since January 2010. Details include: description of request, resolution, and how long it took to resolve. Customers now have the ability to quickly access and review previous requests, possibly enabling them to find solutions and eliminate the need to enter a request if similar requests have been submitted in the past. The HRSA Request History provides details of the most recent HRSA requests that have been entered for the requisitor for each system. Customers will now be better able to determine current and previous access prior to submitting new and modified requests. Negy pointed out that the Request History link works with

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NED to determine the requestor’s ID, therefore users need to select the individual from the NED lookup on the form.

- **Modifications to Benefits Report Parameters (05/26/2016)**
  Sam explained that on May 26th, the WiTS Team released an enhancement to the Benefits Report Parameter page to allow for multiple selections for both the Benefit Form and Benefit Event filters. This provides users with increased flexibility for filtering these reports.

- **Enhanced Filter Options for Selected Reports (05/10/2016)**
  Again, in an effort to provide more flexibility for our report viewers, on May 10th the WiTS Project Team announced the enhancement of multiple CSD reports to allow for multiple selections. The following reports were impacted:
  - Award Report – Multiple Award Types may now be selected.
  - Pay Adjustment Report – Multiple Pay Adjustment Types may now be selected.
  - Pay Allowances and Supplements Reports – Multiple Supplemental Pay Types may now be selected.
  - Pay Incentives Report – Multiple incentive types may now be selected.

- **Additional Data Available on Status Report (04/28/2016)**
  Sam informed the group that on April 28th, the WiTS Team announced the enhancement of the WiTS Status Report to include the Date Cert Sent to Selecting Official. Terrye mentioned that this was done in an effort to clarify for report viewers, specifically IC customers, the difference between the date the cert was issued and the date the cert was sent to the selecting official, which are not always the same date.

### In Progress/Upcoming Enhancements

- **WiTS NIHTC Class Offering Reports**
  Sam informed the group that the NIHTC Reports are currently available in our user acceptance testing site and a few representatives from the NIHTC have had the opportunity to provide feedback. Two separate reports were developed; the NIHTC Class Offering Report, which has three separate views (overall view, cost view, and class schedule view) and the IAA Report. We plan to launch these reports to our production environment on Friday July 22nd.

- **Removing Training Approver Function from Administrative Workflow**
  Sam explained that ASB and OIMP have requested to remove the Training Approver Function from the Administrative Workflow. This enhancement will remove the function in the system that requires that WSDD (or OIMP), review training requests before sending them to ASB. This will be completed in the next few months.

- **Position Management**
  Terrye noted that the WiTS Team is continuing to refine the requirements for enhancements to the Job Code/Position Number request form and have begun development. This includes adding a lot of business logic related to JC/PNs, (for example, business intelligence to say whether or not a position should be Exempt based on other criteria), and will also provide a lookup to Cap HR to identify open JC/PNs that can be used. Also, the JC/PN workflow will be linked to the Appointment, Career Change and Change in Work Schedule processes during Phase 2 of the enhancement later this calendar year. The Project Team will be meeting with CSD Leadership on 7/28 to discuss this enhancement and request CSD Subject Matter Experts.

- **WiSC Action Item:** Please let the WiTS Team know if you are interested in serving as an SME for this project.

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• **USA Staffing Interconnection – Upgrade**
  Terrye noted that we are still in preliminary meetings with OPM and HHS related to the USAS Upgrade and the ways that our current WiTS interface with that system will need to be changed. More to come at the Fall WiSC meeting.

• **Training/User Support**
  • **Delivered**
    Sam noted that participation in training surveys is very low and asked the group to encourage their staff to take the WiTS surveys after attending training.
    - Basic WiTS Training for New CSD Users (6/7-8/2016)
    - WiTS Super User Training (05/24/2016)
    - WiTS Reports Training for CSD Leadership (05/12/2016)

• **Upcoming**
  Sam noted that [WiTS Training Offerings](#) have been updated to include trainings for the rest of CY 2016, and asked that the WiSC members encourage staff to register for trainings.
    - Leveraging Your WiTS – Submitting Administrative Requests (08/16/2016)
      Session is for WiTS users who use the Administrative Request Workflow as Requestors, Gatekeepers and/or Approvers.
    - ER/LR WiTS Training – Late Summer/Fall 2016
      Session for ER/LR to review the ER and LR workflows in WiTS along with associated reports.
    - IC Your WiTS, Now What’s the Status? (09/21/2016)
      Session will cover the basics of WiTS Reports for Administrative (IC) Users. The session will cover how to access reports, generating and interpreting the data, exporting reports to different formats, and our WiTS Report Subscription Service.
    - WiTS For Hire (10/04/2016)
      Session for WiTS users who are new to CSD or would like a refresher on the Recruitment and Appointment Workflows in WiTS.
    - Reports of Your Success (10/26/2016)
      Session discusses WiTS reports at a basic level for CSD users. It covers how to generate reports, interpret the data, exporting reports, and other basic functionalities.
    - WiTS Way Should I Go? Navigating the System (11/02/2016)
      Session is for ALL new WiTS users. This training is intended to orient users to navigating the system, entering, routing and completing WiTS actions, and the basics of running reports.

• **Training Suggestions?**
  Terrye mentioned that the Team is looking to revamp the way we offer training, and that, specifically, we are breaking up the 2-day Basic Training class into a number of abbreviated, focused classes on particular topics. WiSC was asked to contact the WiTS Team with suggestions for any additional trainings that may be helpful to your co-workers.

• **Reminders/Guidance/Discussion**
  • **Access History Report Subscriptions**
    Negy announced to the group that the Second Quarter Access History Report Subscriptions were sent July 4th. These reports listed all users within each WiSC member’s office (as determined by Admin Code) and the most recent HRSA ticket submitted for each user with their roles/permissions for each of the HR systems. The WiTS Team asks our WiSC members to review the roles/permissions for each user and submit a HRSA ticket if a new, modify or a delete ticket is needed. Negy noted that
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- **Appointment Form & NED data integrity – Impact on Orientation Tool**
  Kim explained that on June 2nd, a notice was sent to users in an effort to ensure that WiTS and NED match. WSDD is now using Badge IDs to help track mandatory trainings for new employees. They are able to pull the Badge ID into the WiTS Excel Orientation Tool by matching the appointee information from WiTS and NED. Therefore, it is important to ensure the information matches in both systems. Kim noted that there shouldn’t be any issue with Appointment actions that are initiated directly from a Job Requisition, however for standalone appointment actions, the following guidelines should be followed to ensure WiTS matches NED:
  - Omit the suffix (Jr. Sr., etc.)
  - Enter the Legal name (multiple first and last names if applicable)
  - Verify the Admin Code matches.

- **HRSA WiSC Guide**
  Kim explained that based on feedback provided in a recent training, the WiTS Team has created simple reference sheets for completing HRSA tickets for each OHR Division. WiSC members were asked for their feedback on the format given two examples that were provided. The WiSC members voted in favor of the version provided by Kim.

  ➢ **WiTS Team Action Item:** The WiTS Team will be finalizing this document and creating versions for each OHR Division and will notify WiSC members when this document is ready for use.

- **WiTS Yammer (Wammer)**
  Sam announced that the WiTS Yammer Page, Wammer, has officially been launched. The WiTS Team asks all WiSC members to join the Wammer page and to encourage their co-workers to join as well. The Wammer page is an excellent forum for the WiTS Team to cast votes on enhancements /system preferences, to discuss suggestions for enhancements, and so much more.

  ➢ **WiTS Team Action Item:** The WiTS Team will be sending out Wammer invitations and instructions on how to join in the coming weeks.

- **Report Multi-Pick Options**
  Recent enhancements to several reports now allow for report viewers to select multiple selections for certain fields. Once a user indicates their selections for these fields, these preferences remain with the report until you begin a new session, the multi-pick will not revert back to all selected. Kim asked the group if they would like to receive a pop-up reminder if not all types are selected as a reminder that the multi-pick field has been changed. The WiSC members indicated that a pop-up notice wouldn’t be necessary.

- **Including attachments to WiTS emails after DEU approval**
  Jeff Middlebrooks explained to the group that the DEU does not think it is necessary to include the WiTS attachments with the WiTS emails that are sent after the Vacancy Announcement has been approved by the DEU. The WiTS Team confirmed that is possible to choose to include or not include the WiTS action attachments with the emails that are sent from WiTS. The WiSC members agreed that as long as the attachments remained with the action, they were not necessary to be included in the email communication after the DEU Vacancy Announcement approval.

  ➢ **WiTS Team Action Item:** The WiTS Team will adjust this preference in the system.
• Hiring Decision Needed Reminder Email
Kierra Kenion explained that in the case of shared certificates, the Hiring Decision Needed Reminder email sends unnecessary emails to the program area for some certificates. She explained that even if the Date Hiring Decision Received is completed for a certificate, if there are other certificates that have not, WiTS continues to send the Hiring Decision Needed Reminder Email for all certificates on the action.

➢ WiTS Team Action Item: The Team will look into this issue and provide update to the group.

Lisa Stevens also mentioned an issue with emails going to selecting officials about returning certificates after they had been returned, however, it was discovered after the meeting that the email she mentioned was actually one sent from USA Staffing, not WiTS.

III. Next Meeting: TBD (Fall 2016)