Workday Governance Model
February 4, 2021

Since launch, the Workday Team and Governance teams have been evolving — learning from successes and challenges, adapting processes to meet the needs of the users and the agility of the Workday platform itself.

REQUEST INTAKE PROCESS

Qualtrics Form
Workday change requests should be sent through the [Workday Change Request Qualtrics form](#), located in [Workday Central](#). This form provides one clear location and method to request changes.

Additionally, adoption of this form helps to provide the Workday Team with critical information regarding the change request from the beginning, resulting in more accurate and faster resolution of request items.

All users can submit a change request form, including any of these parties:

- All UVA Workday users
- UVA HR Benefits / Compensation teams
- UVA HR Talent Support / Solution Center
- UVA HR Senior Directors of Service
- Training Team
- UVA HR Recruiting
- UVA Payroll

Workday Request Process
After submitting a change request through the Workday Request Qualtrics form, a change control case is created. The Workday team gathers more information and creates an Adoption item in Workday to allow for prioritization.

The Workday team will meet with governance teams to prioritize Adoption items and backlog items.

Change Request Communications
When an item is prioritized for the current quarter, the Workday analyst will notify the change requestor of such. The Workday team will then proceed to work on the changes and test solutions, staying in contact with the change requestor for questions and testing.

Communication and training needs are considered for each change item prior to implementing the change in production.

Upon implementation, formal communications are sent to the requestor.

Update information is provided to the UVA community broadly through newsletter announcements and posting quarterly notes in Workday Central.
**WORKDAY BUSINESS REQUEST PROCESS**

**PROCESS PRINCIPLES**

1. Adding Value
2. Agility
3. Transparency

**REQUEST PRIORITIZATION**

**DO NOW**
- Program or policy change, HR Operational Calendar, Legal/Regulatory/Security
- Data quality fixed

**DO LATER**
- Small process efficiency gain, Nice to have features, Idea needing to be addressed

**DO NEVER**
- No longer a need, Not possible, Better solution possible

**1. Customer Requests**
- Understanding, scoping, and scaling of customers’ requests from phone calls, chats and emails

**2. Salesforce**
- Records and intakes customer requests
- Identifies bug issues/operations or change control item

**3. Workday Adoption Planning**
- Visibility into what we are working on
- Shows Roadmap & upcoming items
- Shows backlog of items in Change Control
- Approved items for configuration

**4. Jira**
- Tracks approved Change Control items from the WD Adoption Planning
- Tracks current release items and work
- Tracks progress of:
  - Testing, bugs fixes, and new integrations
  - Operational items needing configuration changes

**5. Training**
- Educate users on any changes

**6. Communications**
- Message new functionality to impacted users
TYPES OF REQUESTS

Operational Support:
This type of support includes two categories:
1. Day-to-day break-fixes when someone is stuck and cannot complete their work or needs an immediate resolution. These issues should be directed to the UVA HR Solution Center (AskHR@Virginia.edu) rather than to the Workday team’s change request form.
2. Production support issues including:
   - Pay-impacting issues
   - Critical integrations (vendors, systems)
Production support issues that are not immediately critical, can be vetted and prioritized, should be directed to the Workday team through the change request form. If a system change is required, these requests feed into Jira, our official source of IT audit.

Change Requests:
Requests to optimize Workday and to eliminate work-arounds. These are prioritized in Workday Governance meetings and are delivered during Releases.
   - Eliminating workarounds
   - Optimizing and enhancing Workday
Change requests feed into our Workday adoption planning for evaluation.

Projects:
Work that builds new functionality and capability within UVA HR.

UVA PRIORITIZATION PROCESS

The below methodology guides determining which requests will be developed as solutions within each quarter:
1. Items are initially sourced from the Change Request Log.
2. Items are stored in Workday Adoption Planning, categorized by functional areas.
3. The Workday Team meets monthly with Governance teams (by functional areas) for their input on change request prioritization. Teams follow the Request Prioritization Model as a guide for evaluating what requests should be prioritized. (See image below.)
4. The Workday Team works on resulting list of prioritized items during each quarter.
REQUEST PRIORITIZATION MODEL

Requests are prioritized by the Workday Team and the Governance teams using the following model. This model allows us to ensure that issues of the highest urgency and highest value are tackled first.

**DO NOW**
- Creates efficiency, eliminates complexity
- Program or policy change
- HR Operational Calendar item
- Legal/Regulatory/Security - data protection risks
- Data quality fixes for a large population

Highest urgency, highest value

**DO NEXT**
- Addresses a capability gap
- New Data Exchange need (integrations)
- Process improvements
- New service offering

Moderate urgency, moderate value

**DO LATER**
- Small process efficiency gain
- "Nice to have" features
- Idea submitted that needs to be addressed

Lower urgency, lower value

**DO NEVER**
- No longer a need
- Not possible
- Other better solution in place to address issue

Lowest urgency, lowest value
The Workday Team will meet with individual functional teams according to the below cadence. This structure ensures more effective Workday Governance, promotes clarity of roles and more meaningful participation, and enables impacted teams to have a significant voice in prioritizing requests and changes.

<table>
<thead>
<tr>
<th>Group</th>
<th>Attendees</th>
<th>Meeting</th>
<th>Cadence</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>Rebecca Gristina, Debbie Glass, Bill Birchler, Joanne Hoagland</td>
<td>1) Discovery</td>
<td>Monthly</td>
<td>Discovery: Meet to identify new change control items</td>
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<td></td>
<td>2) Prioritization</td>
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<td>Prioritization: Meet to prioritize items for upcoming quarters</td>
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<td>Terri Stevens, McLean Schoonover, Debbie Glass, Chris Smarte</td>
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<td>Core HCM</td>
<td>Melissa Frederick, Gabriela Garcia-Largen, Jenn Oliver, Jennifer Weaver, Amanda Easton</td>
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<td>Payroll / Time</td>
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<td>Tracking</td>
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<td>needed</td>
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<td>Provost / Academic</td>
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<td></td>
<td>As</td>
<td>needed</td>
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</table>
RELEASE ITEMS AND BACKLOG ITEMS

**Quarterly Update Information:**
Items prioritized in the governance meetings slated for the current quarter. This list is posted in Workday Central.

**Backlog Items:**
Requests not yet prioritized for a quarter. Items on this list may be worked on at a later date. This list is also posted in Workday Central.

**Key Operational Activities:**
HR operational activities that occur each year. These may require configuration changes and testing. Example include Open Enrollment, Merit, Performance Review, etc.

**Projects:** An effort with a fixed duration to introduce new capabilities. These typically take place outside of the scope of prioritization for each quarter.

**2021 ROADMAP**

View a list of our [2021 Roadmap items](#) on Workday Central, filterable by category, requestor, and expected timeline.

**COMMUNICATIONS**

Update information is communicated through a variety of means, including:

- As needed, individual teams and departments are informed in person or via email that their requests have been completed and are provided details about the change.
- To ensure individual requestors and the broader UVA community have access to Workday information, quarterly update information is published on Workday Central. This information is filterable by Functional Area, Division (Academic, Medical Center, etc.), and Status (complete or in progress) so that users can easily find the information they're looking for.
- Quarterly information is additionally submitted to newsletters across the University and UVA Health.
- Historical items and backlog items are maintained on Workday Central, both also offer filtering functionality.