Tugela PEOPLE

YOUR 2021 CHECKLIST

sage People

WX Self-Service

- Remember to post your Festive and New Year messages on your Employee Self Service or better still, schedule them to appear/disappear.
- Schedule any annual compliance notices to appear on the Employee Self Service and track which employees have signed the agreement.
- Consider using WX Reports if you don't already. They can give managers insights into their team's performance over the last year, including absence, objectives and recognition, and ensure they can effectively track performance over the year to come.
- Consider setting up and using Pulse surveys to capture feedback from employees for an end of year engagement check-in.

Workday patterns

- Check that public holidays (bank holidays) not set as "reoccurring" are correct for 2021 (and beyond if you have future years).
- An extra bank holiday in the UK has been awarded to mark the Queen's Platinum Jubilee for 2022, so might be worth:
- Adding an one-day holiday on 03/06/2022
- Configuring the late May Spring Bank Holiday to be non-recurring for 31/05/2021 and 02/06/2022, and then recurring thereafter on the last Monday of May.

Performance

- For those using strategic objectives, remember to edit the strategic objectives picklist to align with the Company's 2021 Corporate Objectives

Absences

- If you are you allowing team members to carry over all, or part of their annual leave entitlement for an additional two years, make sure this is configured and tested by the start of 2021.
- Remember to create or extend absence adjustments for 2021 for those that have them.
- Check that the "Hold Absence Balances" batch is set to run, as this is very useful for reporting.
- Remember to check that Carry Over has been set up on your absence accrual patterns, and ensure that negative carry overs are configured in line with policy.

Reports

- Check that Snapshot reporting is working and is scheduled to run in case you need headcount figures as at the end of the year.
- Check date ranges on scheduled reports to ensure they mirror the company financial year.
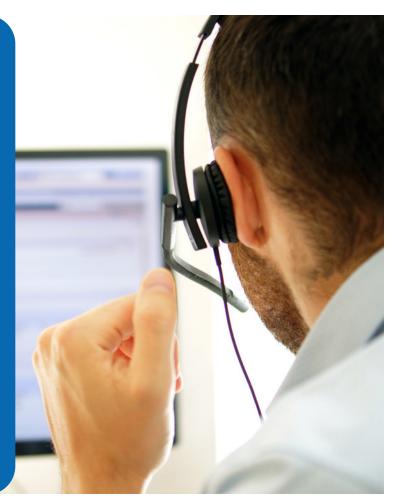
Other

- Check that Sage People licences for all leavers have been deactivated and review that there are enough licences available for your medium-term requirements.
- For those using the Resource Manager, remember your new Active Resource Plan for 2021 to track the budgeted and signed off New positions.
- Update exchange rates if they're updated on an annual basis.
- Are you aware that the Adobe Flash based resume previewer in Sage People is being replaced? Adobe Flash reaches end of life on 31st December 2020, and there may be some actions you need to complete in your org to support the transition to Sage People's own viewer.

You might also want to consider:

- In October 2021, in conjunction with Sage People's Winter '22 release, the old Absence process will be depreciated, and all clients must have the Time Off process enabled at that time. Have you considered moving over yet, and are you aware of the enhancements that come with Time Off?
- Lightning Experience is the next generation of the Salesforce platform that aims to deliver a new modern user interface and improved navigation.
- Taking advantage of new Sage People functionality such as objectives and conversations, Compensation Planning and half day absences.
- Have you considered a Sage People health check? A health check examines any areas of potential improvement or inconsistencies in your system, from which we can propose corrective actions and suggest enhancements as appropriate. This improves the efficiency and effectiveness of your Sage People HR System and promotes increased user adoption and productivity.

This article has been authored by Jamie Wilkins, Head of Managed Services for Tugela People. Jamie has a degree in Business and Human Resource Management and is CIPD qualified with over 10 years' experience in the HR industry. Jamie is responsible for leading a team of consultants that offer technical solutions and comprehensive Sage People HR System support through our flexible managed services function that spans the full spectrum of HR disciplines.

"At Tugela People, we aim to wow our clients. We're passionate about getting the most from Sage People so you can maximise the automation and employee engagement benefits of the Sage People system."
Thomas Schilling, MD and Founder

Help is at hand

For additional information about any of these features or support in making changes or updates, our Managed Services team will be happy to help. Contact us directly on:
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