PESC Fall 2013 Data Summit

Kim Bartkus
HR-XML Consortium
Who is HR-XML Consortium:

- Nonprofit, global, member-driven organization
- Leader in the development, maintenance, and promotion of HR data exchange standards
- International organization – specifications are relevant across many country contexts
- The certifying organization for HR-XML standards
- A community of members and participants from:
  - HR software and service providers
  - End user organizations
  - Other industry standards bodies
Organizational Structure

Global Board of Directors

Technical Steering Committee

Business Steering Committee

Assessments

Screening

Recruiting & Onboarding

Payroll

Benefits

Other

Employee Performance Management

Indicative Data

Staffing

Time and Expense
Project Methodology

1. Write/Submit Proposal
2. Review/Approve Proposal
3. Develop Project Plan
4. Model Business Process
5. Define Elements/Attributes
6. Develop Schema
7. Develop Sample Data
8. Compile Documentation
9. Review Deliverables (TSC, Staff)
10. Membership Review
11. Membership Approval
12. Distribution and Maintenance

www.hr-xml.org
Project Team

- Team lead is responsible for determining the schedule and facilitating the project.
- Secretary records all decisions and posts minutes.
- Diagram editors create use case diagrams.
- Schema editor makes schema changes and updates repository.
- Instance editors develop sample data.
- Domain experts share knowledge of the business process, enabling team to build a comprehensive standard.
How HR-XML Benefits the Industry

**Software and Service Providers**
- Easily integrate with other systems.
- Save on implementation and maintenance costs.
- Build recognition among customers and the HR-IT community.
- Entry into the HRCertify registry and recognition as a technology leader.

**HR Consultants and Practitioners**
- Simplify data interchange across HR applications.
- Increase confidence among users of interoperable HR solutions.
- Enable HR consultants to take advantage of the benefits from multiple systems rather than being locked to a single supplier.

**Developers**
- Reduce design time and custom coding.
- Established developer communities to share resources and ideas.
- Reduce learning curve.
- Streamline validation with HR-XML’s self-testing tools.
How We Operate:

- Our member community develops and prioritizes our project list based on the ever-changing HR business environment.
- Current deliverables include:
  - Interoperability framework for interactions between HR trading partners
  - Schema for web services (WSDL)
  - Business Case Scenarios
    - Actors and Triggers
    - Diagrams
    - Descriptions
    - Sample XML
    - Business Rules
  - Best Practices

www.hr-xml.org
Common Component - Person
Common Component - Person

- MilitaryStatus Code
  - type: StatusCodeType

- Visa
  - type: VisaType

- CitizenshipCountryCode
  - type: CitizenshipCountryCodeType

- ResidencyCountryCode
  - type: ResidencyCountryCodeType

- Race Code
  - type: oa:CodeType

- Ethnicity Code
  - type: oa:CodeType

- Nationality Code
  - type: oa:CodeType

- Religion Code
  - type: oa:CodeType

- BirthPlace
  - type: BirthPlaceType

- BirthDate
  - type: FormattedDateTimeType

- Gender Code
  - type: GenderCodeType

- MaritalStatus Code
  - type: MaritalStatusCodeType

- Primary Language Code
  - type: LanguageCodeType

- Disability
  - type: DisabilityType

- User Area
  - type: UserAreaType
Common Component - Profile
Country Specific Localizations

```
<OfficialPositionClassificationType>
  <USPositionClassification type="USPositionClassificationType"/>
  <DEPositionClassification type="DEPositionClassificationType"/>
  <UserArea type="UserAreaType"/>
</OfficialPositionClassificationType>

<TaxInstructionsType>
  <CATaxInstructions type="CATaxInstructionsType"/>
  <NLTaxInstruction type="NLTaxInstructionType"/>
  <USTaxInstructions type="USTaxInstructionsType"/>
</TaxInstructionsType>
```
Standards Development

- Current Projects
  - Salary Survey
  - Recruiting/Contingent Staffing Enhancements
- Future Projects
  - Lightweight JSON conversions
  - Post Payroll
  - Others?
Training

- Web-based Training Courses
  - Available at online store
  - Organizational member discount
- Webcasts
  - New Specifications
  - Member Orientation
  - New Tools
  - Implementation and Case Studies
- Face-to-face Annual Meeting
- Technical Training by Request
Standard Organization Interoperability

- Group of Consortia meeting weekly to discuss opportunities to work together
  - Joint Projects
  - MOU’s
  - Shared processes and/or standards

- Webinar
  - Current progress
  - Tentative schedule for November 19, 2013

- Face-to-face
  - Possibly Madrid in the spring
  - More in-depth discussions
  - Progress on joint projects
Stay Connected

- Become a Community Member at www.hr-xml.org
- Forums on hr-xml.org
- Follow us on Twitter @HRXML_HQ
- Join the HR-XML group on Linked In
- Become a fan at http://www.facebook.com/hrxml
HR-XML Specification Details
Recruiting Standards

**Position Opening.** Details and requirements for a position

**Candidate.** A collection of data about an applicant or prospective employee or resource

**Search Document.** Provides a way for one system to request matching records for a query against another system

**Worker Onboarding.** Data about an applicant who has accepted an offer and is in the process of onboarding

[www.hr-xml.org](http://www.hr-xml.org)
Assessments

HR-XML's Assessments support the procurement of assessment services and the integration of assessment results.

**AssessmentCatalog.** Contains a set of information about assessment services or tests available to a customer.

**AssessmentOrder.** Defines a set of information necessary to execute an order for an employment test or assessment.

**AssessmentReport.** Provides scores and other details to fulfill or respond to an assessment order.
Screening

Screening Catalog.  A set of information describing a screening provider's catalog of services

Screening Order and Report.  Data necessary to submit or administer screening requests to screening service providers. The report includes information fulfilling or relating to the order

Screening Package Order and Report

CreditResult.  May be used independently or within Order and Report
EmploymentEligibility (I-9). A set of information to document that each new employee (both citizen and non-citizen) is authorized to work in the US.

Screening Vendor Order and Report. Data required by the researcher to run the appropriate criminal, civil or federal searches requested by the CRA.

Drug Test. Drug test order, status and result data sent between employer, collection site, drug testing company, lab, and MRO.
Benefits Enrollment

HR-XML’s Enrollment specifications support enrollment for employee based benefits

**US Enrollment.** Provides for “tier-based” coverage (Medical, Dental, Vision), rate based coverage, and flexible spending accounts

**Saving Plan Enrollment.** Allows the communication of enrollment and election information for savings and defined contribution plans
Benefits Enrollment (Stock)

**Stock Plan Participant.** A collection of information relevant to create and maintaining stock plan participant records maintained by plan administrators.

**Stock Plan Enrollment.** A collection of information relevant to create and maintaining employee stock plans. Supported plans are Stock Option, Stock Purchase Plans, and Stock Awards.
Data Provisioning

**Indicative Data.** Describes relationship between employer and employee relevant to provisioning outsourced benefits and payroll systems

**Master HR Data.** Contains broad set of information about a human resource. Typically used to provision or synchronize data between and among HR systems
Data Provisioning (cont.)

**Organization Chart.** A simple, "open model" structure for communicating basic information about an organization

**User Account.** Used to establish and maintain user accounts for application/system
Employee Performance Management

Supports integration of EPM result data with other arms-length systems
EPM (cont.)

**EPM Participant.** Data relevant to enrolling a participant within EPM program

**EPM Rater Panel.** Data relevant to panel responsible for rating employee's performance

**EPM Result.** A result from EPM process or "appraisal“
  Includes remuneration recommendation

**Development Plan.** Supports communication of a training or development plan

[www.hr-xml.org](http://www.hr-xml.org)
EPM (Objectives)

EPM systems and various project and resource planning systems may generate individual objective plans.

Objectives Plan. Supports the specification of objectives, groups of objectives, and related metrics and metadata

Objective Result. Supports the results of objectives, groups of objectives, and related metrics
Staffing

Used within the contingent staffing industry

**StaffingOrder.** A set of information necessary to place and manage an order with a staffing supplier. Also used for Quotes and RFQ’s

**StaffingResource.** Set of terms and conditions related to the placement of a resource with a customer

**StaffingAssignment.** Information relating to a person to fulfill a staffed position or role
Time Management

**TimeCard.** Supports the capture of time-worked data as well as information about associated expenses and allowances.

**HR-XML Recommendation:** Implementers use HR-XML's IndicativeData or HRMasterData nouns to provision time and attendance systems.