Tipping the Scale: How to Leverage Your Size for Recruitment and Pre-Boarding
ABSTRACT: Tipping the Scale: How to Leverage Your Size for Recruitment and Pre-Boarding

You’ve heard it time and time again, for HR, it’s all about finding and retaining top talent. But, what makes sense? How do you determine which processes and activities to centralize and automate? Join this presentation to hear how HCA uses its size and scale for their recruiting and pre-boarding processes. Where did they start? What are the main challenges? What are the key lessons learned and successes? What further opportunities exist?
Speakers

Janet Gilmore  
VP HR  
Operations

Kelly Furbee  
VP Talent  
Acquisition

Leigh Mangum  
VP HR Shared  
Operations
Agenda

- Company Overview
- HR Transformation Overview
- Recruitment at Scale
- HR Service Center Overview
- Lessons learned and Ideas on the horizon
- Questions
HCA Overview
A leading healthcare provider delivering patient-centered care

Mission:
Above all else, we are committed to the care and improvement of human life.

- 170 Hospitals in the U.S. and in the U.K.
- 114 Ambulatory Surgery Centers
- 51 Freestanding ERs

HCA stands for the best practices of medicine, using our reach, scale and stability to transform healthcare and help communities thrive.

http://hcahealthcare.com/about/hca-at-a-glance.dot
Patient encounters each year

27+ MILLION

8.4 million emergency room visits annually

249,000 Employees

37,000 Active physicians

78.2% Female

21.8% Male

80,000 Nurses

Generations

<table>
<thead>
<tr>
<th>Generation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>46.66%</td>
</tr>
<tr>
<td>Gen X</td>
<td>27.15%</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>24.34%</td>
</tr>
<tr>
<td>Gen Z</td>
<td>1.29%</td>
</tr>
<tr>
<td>Traditionalist</td>
<td>0.55%</td>
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</table>
HR Transformation Overview
HCA HR Pre-2015

- 200+ loosely federated, separate HR functions
- Corporate HR functions were advisory only and too leanly resourced
- Based in Nashville from HQ, HCA's solid foundation of shared services included HR in only a few functions
  - Health & Group Benefits
  - Leaves Management
  - Core HRMS system

Local autonomy resulted in a high degree of variation in process, policy, quality, performance and HR skills
HCA HR Transformation 2012-2016

Implemented an enterprise wide comprehensive shared services operating model

HR Business Partners

HR Business Partners embedded in operations, supporting local facilities

- HR Business Partners provide strategic people & culture advising to assigned business leaders
- HR BPs remains at locations, supporting local teams for employee relations and other needs

HR Operations Center

HCA HR Answers

- HCAhrAnswers team provides 24x7x365 HR support for questions, transactions by phone, web chat
- Self-service HCAhrAnswers Portal offers access to policies, forms, search
- HCA HR Answers also manages Recruiting Admin, Onboarding Admin, and Workforce Admin

HR Centers of Excellence

HR COEs provide deep functional expertise to HR Business Partners & HCA leaders

- Recruiting
- Talent Management
- Total Rewards
- Labor and Employee Relations
- HR Communication
- HR Strategic Analytics
- Patient Experience
- Cultural Development & Inclusion
HCA HR Transformation 2012-2016

- Re-designed every HR process, role, and policy
- Established enterprise-scale, fully functioning HR centers of excellence
- Launched an HR service center for employee services, HR data management, and transactions
- Strengthened and added HR technology
- Conducted HR talent assessment to determine reallocation potential, upskilling and

Results:
- Faster and more consistent handling of high volume functions like transactional support and Talent Acquisition
- More focus on strategic workforce interventions specific to individual geographies, engagement and culture, and leadership development
New Expectations of HR

Greater efficiency and expertise, along with higher expectations

• Operational rigor around measurement, continuous process improvement, and results

• “Seat at the table” becomes real; HR is counted on to deliver real results on critical workforce challenges that have a direct affect on operations

To enable our operational strategies, we must have an effective human resource organization that develops and supports a competent and efficient workforce, which is essential to our mission of delivering high quality patient care.

This well-organized and coordinated structure in HR should lead to performance improvement and ensure better alignment with the operational needs of the company.

HR will improve its operational discipline, hardwire consistent business practices, and align with key company initiatives.
Recruitment at Scale

Kelly Furbee
VP Talent Acquisition
Talent Acquisition
Technology Enablers

Source
Screen
Interview
Offer
Onboard

Talent Pools
Applicant Tracking System (ATS)
Pre-hire Assessments
Video Interviewing

Onboarding & Background Checks

Avature CRM
Taleo
infor
enwislen
HealthcareSource
Montage
Assess Systems
PreCheck

Human Resources Group
Recruiting Lifecycle – Phases, Roles, Handoffs

- **Requisition Approval**
  - HRBPs + Operations
- **Source**
  - Sourcers (hard-to-fill roles) + Recruiters (all roles)
- **Screen**
  - Recruiters (screening & offer generation)
- **Interview**
  - Hiring managers and HRBPs (interviewing) + hrAnswers RA Team (interview scheduling)
- **Offer**
  - HCAhrAnswers RA & OA Teams (background checks & onboarding monitoring) + HRBPs (drug screens)
- **Onboard**
Our Process

1. Application received
2. Initial review of application
   - If viable candidate?
     - Yes: Set up phone screen
     - No: End
3. Conduct phone screen
   - If interview scheduled?
     - Yes: Move to HR interview
     - No: End
4. Move to HR interview?
   - Yes: Set up onsite interview
   - No: End
5. Determine offer details
   - Yes: Extend verbal offer
   - No: Conduct onsite interview
6. Conduct onsite interview
   - If recommend for hire?
     - Yes: Accept formal offer
     - No: End
7. Accept formal offer?
   - Yes: Go to credentialing process (D)
   - No: Change step and status to “Round 2” on Taleo
8. Change step and status to “Round 2” on Taleo
9. Change step and status to “Accept formal offer” on Taleo
10. Accept formal offer?
    - Yes: Go to credentialing process (D)
    - No: With additional authority required
11. With additional authority required
12. Application received
13. Initial review of application
   - If viable candidate?
     - Yes: Set up phone screen
     - No: End
14. Conduct phone screen
   - If interview scheduled?
     - Yes: Move to HR interview
     - No: End
15. Move to HR interview?
   - Yes: Set up onsite interview and travel
   - No: End
16. Set up onsite interview and travel
17. HROC Schedule phone interview
18. HROC Set up onsite interview and travel
19. Change step and status to “Schedule phone screen” on Taleo
20. Change step and status to “Phone screen scheduled” on Taleo
21. Change step and status to “Schedule onsite” on Taleo
22. Change step and status to “Hiring managers review” on Taleo
23. Change step and status to “Make offer” on Taleo
24. Change step and status to “Schedule onsite” on Taleo
25. Change step and status to “Hiring managers review” on Taleo
26. Change step and status to “Make offer” on Taleo
27. Change step and status to “Accept formal offer” on Taleo
28. Change step and status to “Round 2” on Taleo
29. Change step and status to “Accept formal offer” on Taleo
30. Accept formal offer?
    - Yes: Go to credentialing process (D)
    - No: With additional authority required
Process Detail

Phone Screen

Initial review of application → Viable candidate? (Yes/No)
  Yes → Set up phone screen → Conduct phone screen → Move to HR interview? (Yes/No)
    Yes → Set up onsite interview
    No → End
  No → End

Yes → Change step and status to “schedule phone screen” on Taleo

No → HROC Schedule phone interview

Hiring Manager Review

No → End

Yes → Conduct onsite interview → Recommend for hire? (Yes/No)
  Yes → Change step and status to “Make offer” in Taleo
  No → End
Position Segmentation

Groupings / Categories

- **Category I**: Critical / Difficult / Visible
  - Includes all leadership positions, Manager and above, and all RN positions (e.g., Nurse Managers, Practice Managers, Directors, and Staff Nurses)
  - Skill Mixes: 01-Mgmt. + 03-RN Direct Care
  - % of Reqs. = ~50%

- **Category II**: Moderately Critical Roles
  - Includes staff level Allied Health positions Rehab Professions (e.g., OT/PT/Imaging) and technicians (e.g., Monitor Techs, Surgical Techs, CNAs)
  - Skill Mixes: Multiple
  - % of Reqs. = ~42%

- **Category III**: EVS / FANS / Clerical
  - Includes all EVS, FANS, and Clerical roles (e.g., Medical Office Assistants, Cashier, and Maintenance/Facilities)
  - Skill Mixes: 06–Clerical & Other Admin + 07 – Environ/Food Service/Plant Ops
  - % of Reqs. = ~8%

Requisitions by Skill Mix (Current Openings)

<table>
<thead>
<tr>
<th>Skill Mix</th>
<th>% of FT/PT Reqs.</th>
<th>% of Total Reqs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 - Management and Supervision</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>02 - Clinical Specialists/Profs</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>03 - RN Direct Care</td>
<td>39%</td>
<td>44%</td>
</tr>
<tr>
<td>04 - LPN/ LVN Direct Care</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>05 - Patient Care Support</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>06 - Clerical &amp; Other Admin</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>07 - Environ/Food Svcs/Plant Op</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>08 – Physicians</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>09 - Non-Physician Medical Pract</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>10 - Non-Clinical Specialists/Profs</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>11 - Clinical Technicians</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Recruiting Process Highlights
Category I – Management & RN positions

1. Requisition Approval
2. Recruiter Conducts Intake Call
3. Recruiter Posts Jobs
4. Candidates Apply
5. Recruiter Conducts Phone Screen
   - HM Review (optional)
6. Recruiter Schedules Onsite
7. Candidates Participate in Onsite*
8. Hiring Manager Selects Best Candidate
9. Recruiter Generates Offer
10. Candidates Accept Offer
11. Candidates Complete Pre-boarding
12. Day 1 Orientation
We Are Blessed With Dashboards....

Retrospective dashboards that measure our applicant flow and hiring performance and compare to prior year and rolling 13 months.

Retrospective Dashboards that measure the time of each step in the recruitment life cycle, from requisition initiate to start date.
Alternatives Considered

**RPO**
- Too costly
- Wanted to keep in-house

**Technology**
- Video interviews
- Self-service scheduling
Service Center Overview

Leigh Mangum
VP HR Shared Operations
Organizational Chart

Vice President
Leigh Mangum

Operations Analyst
Brandy Peek

Admin Assistant
Laurie Estep

Director Evelynne Edmundson

Director Reigen Lemelle-Tuggle

Director Paul Austin

RA Supervisors
Staff

CSR Supervisors
Staff

OA Supervisors
Staff

WFA Supervisors
Staff

Approximately 215 FTEs
The role of the
HR Shared Operations Center

Location: HR Operations Center, Nashville, TN

HCAhrAnswers
The teams of trained HCA staff that answer the phones, emails, chats, work case tickets from the hrAnswers Portal
• Recruiting Administration
• Workforce Administration
• Onboarding Administration
• Customer Service

Operations Support
The team responsible for training new HCAhrAnswers team members, performing routine audits on completed work, facilitating portal and case content review/updates, and our HCAhrAnswers reporting and analytics function.

Types of Service
• Provide Tier 1-2 support to employees, managers, and HR
• Answer basic questions
• Manage transactions
• Support Recruiting
• Run and distribute standard and ad hoc HR reports
• Manage vendor(s)
• Operate and improve self-service HR Portal and other HRIS tools (Taleo, Lawson)

The HCA hrAnswers service groups provide 24/7 information and service to managers, employees, and candidates on the web, on mobile, or over the phone. Our purpose as a part of the HR Support Model is to strengthen the delivery of HR services to our organization
Multiple ways to access HCA hrAnswers

Self-Service
TIER 0

Generalist Support
TIER 1

Specialist Support
TIER 2

Centers of Excellence
TIER 3

HCA hrAnswers Portal

15-20% of volume handled

HCA hrAnswers Center team

0-5% of volume

Self-Service and Contact Center = 90-95% of volume

Home, Work, Contact, 24 hours, 7 days a week
Recruiting Support
Leigh Mangum
VP HR Shared Operations
Recruitment Administration Overview

The RA Team

Provides 24 hours a day, 7 days a week administrative support for all recruiting efforts as part of the HRG support model in HCA.

Works with the Candidates, Recruiters, Hiring Managers, HRBP, ER COE and third party vendors (i.e. – PreCheck, BCD travel)
Responsibilities:

<table>
<thead>
<tr>
<th>Incoming Calls &amp; Scheduling Tasks</th>
<th>Process Background Related Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Answering incoming calls from the following:</td>
<td>• Background Authorization</td>
</tr>
<tr>
<td>• Applicants, Candidates, Hiring Managers, Recruiters, &amp;</td>
<td>• Reviews candidate’s qualifications and initiate the</td>
</tr>
<tr>
<td>HRBP’s</td>
<td>appropriate background package for the candidate</td>
</tr>
<tr>
<td>• Scheduling Phone Screens and Interviews with the hiring</td>
<td>through PreCheck (Level I, II, or III)</td>
</tr>
<tr>
<td>team</td>
<td></td>
</tr>
<tr>
<td>• <strong>Phone Screens</strong>: 15 – 30 minutes between the Candidate &amp; Recruiter</td>
<td></td>
</tr>
<tr>
<td>• <strong>Interviews</strong>: Onsite or Phone – 60 minutes between Candidate &amp; Hiring Manager(s)</td>
<td></td>
</tr>
</tbody>
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## Systems & Technologies:

<table>
<thead>
<tr>
<th>RA work primarily utilizes:</th>
<th>RA work secondarily utilizes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• CMS (<em>Case Management System</em>)</td>
<td>• PreCheck (<em>Third Party Background Vendor</em>)</td>
</tr>
<tr>
<td>• Taleo (<em>ATS-Application Tracking System</em>)</td>
<td>• Lawson (<em>Requisition/Position status</em>)</td>
</tr>
<tr>
<td>• Cisco Finesse (<em>Phone Tracking &amp; Incoming Calls</em>)</td>
<td>• Concur (<em>Travel arrangements &amp; booking</em>)</td>
</tr>
</tbody>
</table>
Candidate Life Cycle
RA Process Flow & Taleo Step/Status Quick Guide

Candidates Apply
- HR Review/To be evaluated

Phone Screen
- HR Review/1 Hr Sched Phone Screen
- HR Review/Phone Screen Scheduled

Onsite/Phone Interview
- Interview/1 HR Schedule Onsite
- Interview OR 1 HR Schedule Phone Interview
- Interview /Scheduled

Offer is made to Candidate
- Offer/Offer to be made
- Offer/Accepted

Round 2
- Round 2/Background Required or No Background Required

BG Authorization
- Pre-employment Screen/Pre-employment Screen initiated
  - (Candidate flows in Lawson and starts onboarding)

Drug Screens
- RA is responsible for ordering and processing drug screens for candidates

Key:
- Process
- Taleo Step/Status
Candidate Life Cycle Detail

Offer is made to Candidate
- Offer/Offer to be made
- Offer/Accepted

Round 2
- Round 2/Background Required or No Background Required

BG Authorization
- Pre-employment Screen/Pre-employment Screen initiated
- (Candidate flows in Lawson and starts onboarding)

Drug Screens
- RA is responsible for ordering and processing drug screens for candidates
Onboarding Administration
The OA Team

Facilitates the candidate onboarding process at the point of background check result completion through confirmation in Onboarding.

Processing background results, adjudications, pre-adverse processes, candidate confirmations, candidate onboarding retriggers, start date changes, rescinding offers and PSG.

Partners with the Talent Acquisition COE, HRIS, HR Business Partners, Managers, Employees, Employee Relations COE, PreCheck, and other HROC Service Groups to ensure HR service delivery is consistently high-quality.
OA Work primarily utilizes:

- CMS (*Case Management System*)
- Taleo (*ATS-Application Tracking System*)
- Cisco Finesse (*Phone Tracking & Incoming Calls*)

OA work secondarily utilizes:

- PreCheck (*Third Party Background Vendor*)
- Lawson (*Requisition/position status*)
OA Candidate Life Cycle
OA Process Flow & Taleo/Steps/Status Quick Guide

BG Check Results
• Pre-Employment Screen/1HR Background Check Complete

BG Adjudication
• Pre-Employment Screen/Decision Pending

PreAdverse/Adverse Action
• Pre-Employment Screen/HRSM PreAdverse

Hired!
• Pre-Employment Screen/Move to Hire
• Hire/Hired

Offer Rescinded Pre-Employment Screen/1HR

Key:
- Process
- Taleo Step/Status

Physician Service Group (PSG)
Hiring and onboarding process for clinical positions (Doctors, Pas, Nurse Practitioners) in hospitals

Human Resources Group
HCAhrAnswers Performance Measures

<table>
<thead>
<tr>
<th>Service Group Productivity (RA, OA, WFA, CS)</th>
<th>Call Metrics</th>
<th>Agent Productivity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case handling metrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cases opened / closed</td>
<td>Average speed of answer</td>
<td>Cases closed / rate</td>
</tr>
<tr>
<td>Close rate</td>
<td>Average hold time</td>
<td>Average SLA</td>
</tr>
<tr>
<td>SLA Met %</td>
<td>Average handle time</td>
<td>Reopen rate and SLA</td>
</tr>
<tr>
<td>Reopen rate</td>
<td>Abandon rate</td>
<td>Satisfaction survey</td>
</tr>
<tr>
<td>Quality / customer sat</td>
<td>Average abandon time</td>
<td>Case difficulty</td>
</tr>
</tbody>
</table>

Used for: retraining, performance / discipline, queue management, call audits, case audits
Lessons Learned
Lessons Learned

• Over communicate risk areas so that if they come to pass, leadership is not surprised.

• Staff up the Recruitment Admin function in the beginning.

• Be transparent about areas you are staffing according to volume but do not have a trusted or accurate baseline measure from which to start.

• Make the hard choices on who is really a recruiter and who isn’t.

• Watch closely and frequently that your recruiters are following the process and not reverting back to old habits.

• You are going to have to refine and revise your process; it’s a matter of when and how much, not if.
Questions