WolfieONE

Change Leader Network Recap
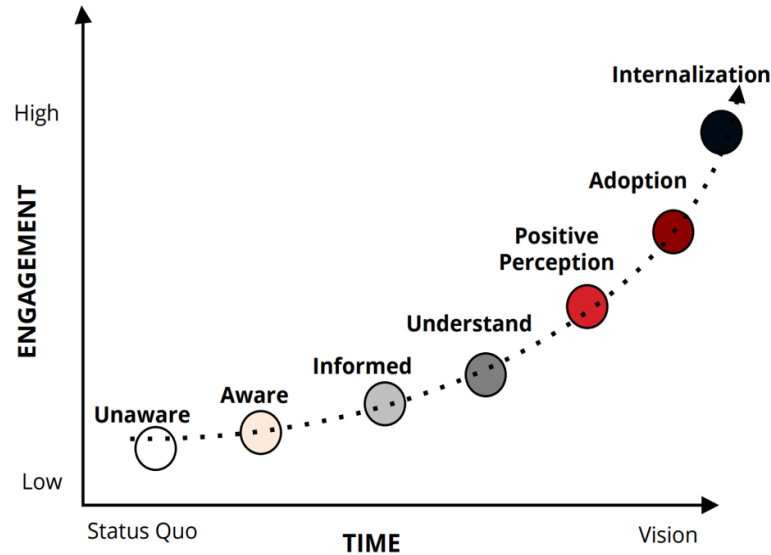
January 10, 2025

FAR
BEYOND

Agenda

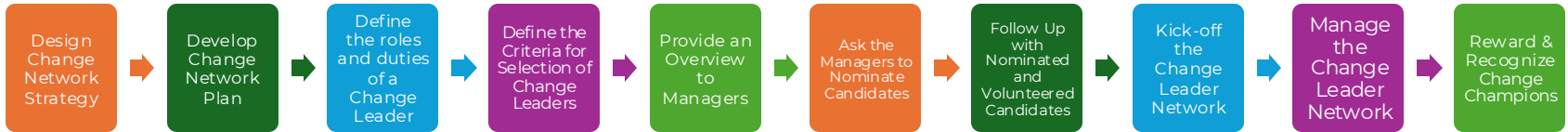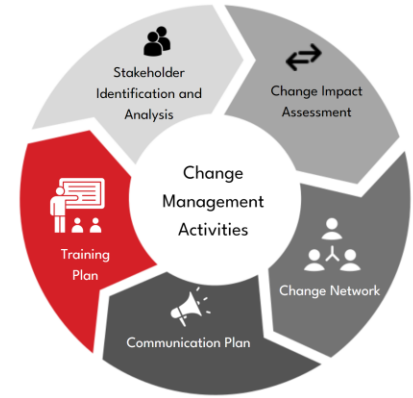Stony Brook University

Change Leader Network (CLN)

Change Management Foundations
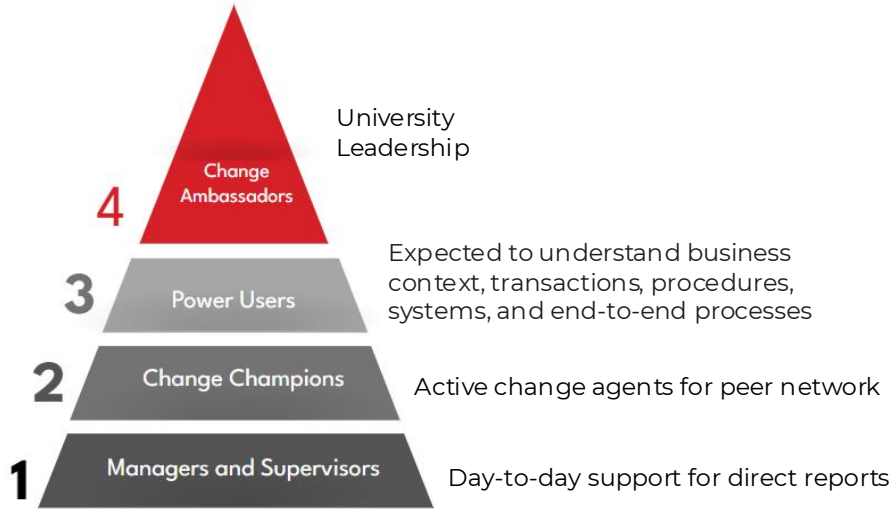
The Engagement Curve

What is a Change Leader Network?

➢ *An integral part of the Change Management Methodology at Stony Brook*

➢ *A peer-led group of influencers and impacted users across Stony Brook who will assist in building awareness, active listening and gathering concerns, promoting buy-in, and providing support to stakeholders impacted by the project*

➢ *An indispensable asset to drive and support change adoption*

Change Management Activities:
Stakeholder Identification and Analysis → Change Impact Assessment → Change Network → Communication Plan → Training Plan

Design Change Network Strategy → Develop Change Network Plan → Define the roles and duties of a Change Leader → Define the Criteria for Selection of Change Leaders → Provide an Overview to Managers → Ask the Managers to Nominate Candidates → Follow Up with Nominated and Volunteered Candidates → Kick-off the Change Leader Network → Manage the Change Leader Network → Reward & Recognize Change Champions

We are here

Conduct training(s)
Socialize Network
Leverage for driving change
Provide Support, as needed
Gather feedback

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Change Leader Network Structure & Benefits

University Leadership

4 Change Ambassadors

3 Power Users — Expected to understand business context, transactions, procedures, systems, and end-to-end processes

2 Change Champions — Active change agents for peer network

1 Managers and Supervisors — Day-to-day support for direct reports

Promote **understanding** to assist employees in understanding changes and dealing with uncertainty

Advocate positive change through face-to-face and informal communications to **change behaviors**

Build **accountability** and **ownership**

Build a **community of early adopters** who value the opportunity to try out new technology first and get a chance to demonstrate their leadership skills

Accelerate the adoption of the change by quickly disseminating timely and accurate information and building trust

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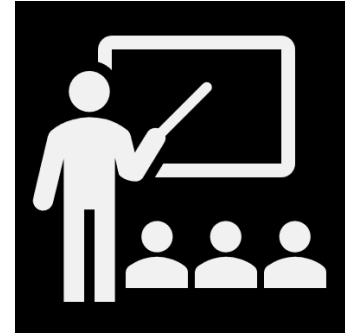
Champion Role

Champion the Program

- Promote yourself as a Champion
- Spread awareness & key information from program to peers & community
- Share the expected benefits

Promote our Guiding Principles

- Stony Brook First
- Transparency and Inclusion
- Governance
- Single Source of Truth
- Optimized Operations and Processes
- Transformation

Participate

- Attend monthly one-hour Change Leader Network meetings
- Accept invites, show up, be engaged
- Attend program and/or workstream-related events and activities (webinars, roadshows, townhalls, etc.)

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Change Champion Journey

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Change Champions will be asked to act as representatives from their departments or units and as partners of the WolfieONE program, and align their WolfieONE expertise with modules/processes, rather than departments.

1. Tell the Change *Story* (Spring 2025)- not the data
- Help peers understand what's "in it for them". Work with OCM to construct a shared "Change Story" at your next leadership meeting, in your upcoming departmental newsletter, or via **existing communication channels**
- Be realistic and **recognize** that change is challenging, **"status quo bias" is expected**

2. Provide Honest Feedback (April 2025)
- Leverage your subject matter expertise and familiarity with your peers and counterparts to help us shape communications, engagement, and training
- Provide input and feedback on program communications

3. Build Trust (ongoing)
- Engage others with whom you have influence, build support (informal networks matter!)
- Become a trusted communicator by taking on the responsibility of keeping your department or group "in the know"

5. Monitor Resistance & Empower End Users
- Serve as an informal "go-to" point of contact for two-way communications
- **Escalate obstacles** that are preventing your group or department from being ready for change as you empower them to be confident that they are prepared for go-live

4. Champion Change (ongoing)
- Continue vocal support as go-live approaches
- Use existing forums and channels to build awareness
- Reinforce the focus on the overall vision (the bigger picture)
- Put up go-live posters in your office / workspace with the QR code that will link to formal training (closer to go-live)
- Use WolfieONE **Zoom backgrounds**
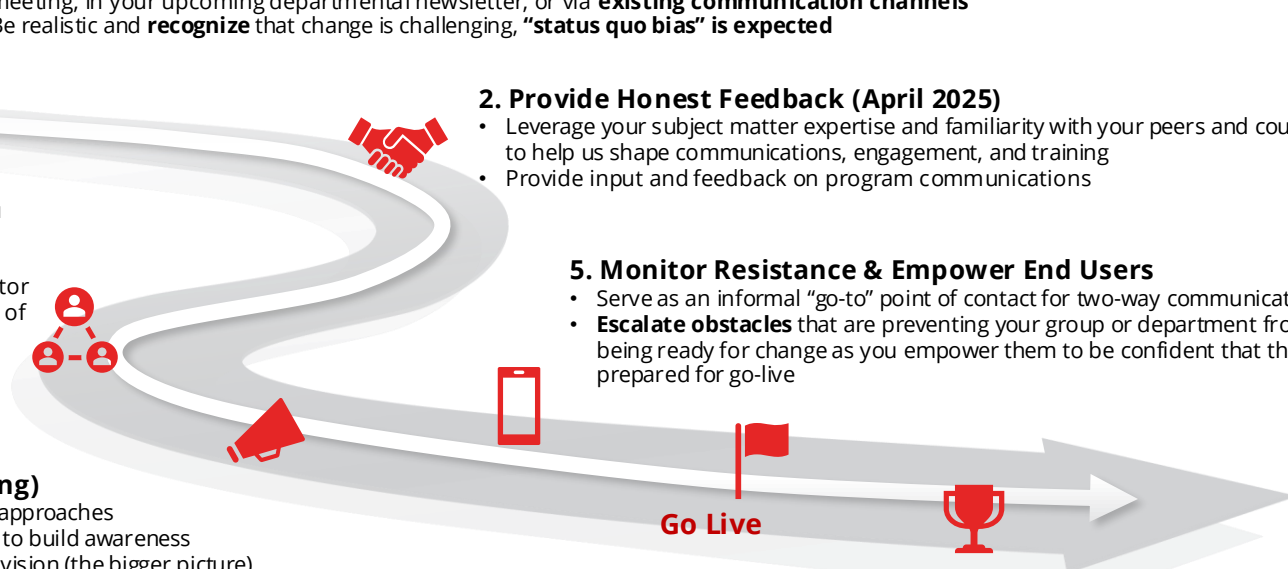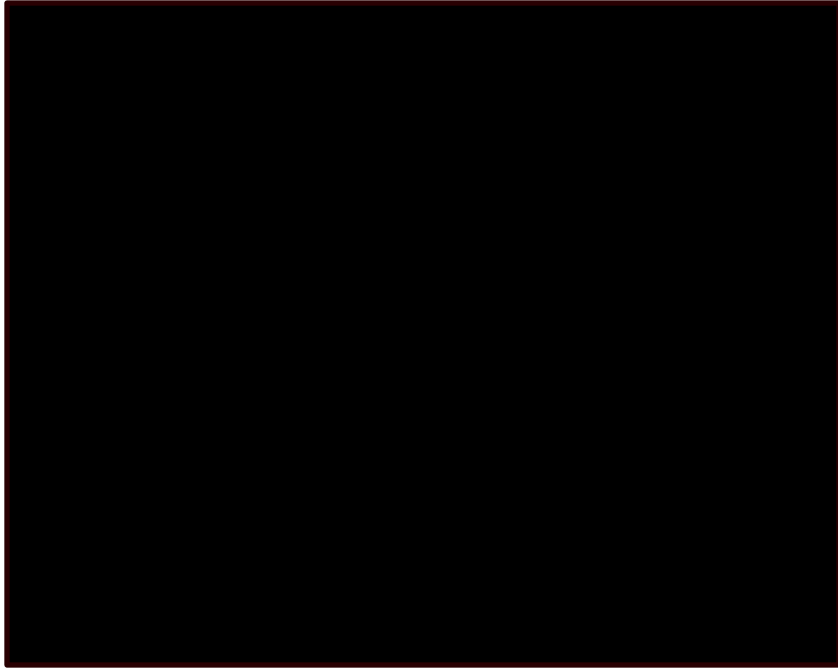
Go Live

6. Support Adoption
- Partner with project leaders to drive adoption and connect end users to support channels
- Set an automatic email reply to reinforce key messages (e.g., "Need help registering for courses this month? Reach out to *ocm@stonybrook.edu")*

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About WolfieONE

# WolfieONE – "How to explain it"

Our WHY:

Beyond the business reasons that became apparent during and post-pandemic, there are human capital drivers for this initiative, such as **employee morale and institutional reputation**.

The industry is moving from on-premise to the cloud in a number of ways. To remain competitive, modernizing archaic systems and processes is essential.

The employee experience and how you spend your time interacting with data is one of our top reasons for this transformation.

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Expected Benefits

➢ Gradual reduction of on-premise (i.e., campus-based) systems, paper-based processes and labor-intensive manual processes

➢ Better integration across various ERP modules which supports smoother transaction processes and more powerful blended analytics/reports

➢ Integrated information systems that provide more up-to-date and accurate financial and operational data that increases transparency, and enhances planning and forecasting efforts

➢ Robust reporting capabilities enabling better decision-making as well as managing from a holistic vantage point rather than a siloed view

➢ Increased automation and self-service processes (and fewer human errors as a result)

➢ Simpler, more intuitive, modern user experiences and enhanced cloud-based data security

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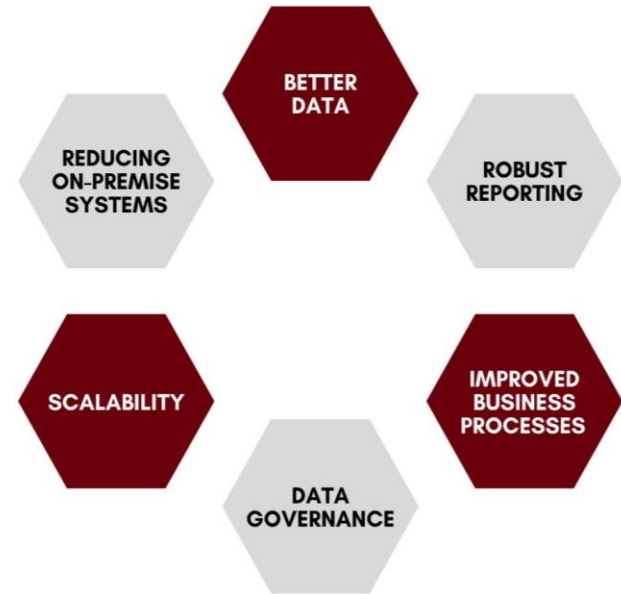
Entity Scope ERP & HCM

The purpose of this Entity Scope view is to articulate how user populations within the below entities will align with respect to Day 1 Future-state WolfieONE application use and/or data integration. The Legal Entities that will be configured in Oracle is <u>separate</u> from this scope view.

Functional Area	Entity									
	SBU	SBF	FSA	RF [3]	SBM					
					SBUH [1]	LISVH [1]	CPMP	ELI [2]	SBSH [2]	Other Affiliates [2]
ERP	Yes	Yes	No	Integrate	Integrate	Integrate	No	No	No	No
HCM	**Yes**	No	No	**Yes**	Yes	Yes	No	No	No	No

Definition	
Yes	Populations within this entity <u>will</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
No	Populations within this entity <u>will not</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
Integrate	Data from this entity will integrate with WolfieONE Oracle Cloud.

Notes
1. **SBUH / LISVH**: EPM at summary level - they have their own budget system for daily operations. ERP – integrate for URAS reporting purposes – they have their own GL. Will load audited financial statement data to FCCS for consolidated financial reporting.
2. **ELI/SBSH/Other SBM Affiliates**: These entities will load audited financial statement data to FCCS for consolidated financial reporting.
3. **RF**: HCM consideration – RF employees include select CPMP and SBF staff.

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Workstreams relevant to Champions for now:

- **Enterprise Resource Planning (ERP): all things Accounting & Reconciliation!**
Note: Student receivables and SIS are not changing (Campus Solutions).

- **Human Capital Management: HR processes**
What's not changing: Interfolio, Handshake, Kronos, and HealthStream

- **Enterprise Performance Management: Budgeting, planning and forecasting.**

- Technology: particularly **Reporting (queries, out of the box, custom)**

- Change Management

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What's Changing?

CURRENT STATE SYSTEMS/PROCESS	FUTURE STATE SYSTEMS/PROCESS
Inconsistency across processes and practices	Standardize processes and practices (80/20)
Oracle/**PeopleSoft** software for Finance	Enterprise Resource Planning (ERP) Cloud
Oracle/**PeopleSoft** software for Human Resources	Human Capital Management (HCM) Cloud
Campus Budget Module (CBM) for Budget and Planning	Enterprise Performance Management (EPM)
SOLAR (time and attendance; employee information, NOT the student side)	Human Capital Management (HCM) for reporting time and attendance
Recruiting and onboarding in **Taleo**	Oracle Recruiting Cloud (HCM)
CPR (Capital Planning, construction)	E-builder, which will integrate with EPM

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What's not Changing?

CURRENT STATE	FUTURE STATE INTEGRATIONS
Jaggaer (WolfMART) SUNY system-wide SaaS solution for Procurement	Some fields will require the new COA, integration with Oracle, end-user will continue to use Jaggaer
Concur for travel & expense reimbursement	End-user will continue to use Concur but will have to know their COA Org and Fund Source.
Hospital - Finance (Lawson)	Hospital finance professionals will continue to use their current COA in Lawson. Exception: patient refunds team in accounting, and budget officers.
Student Information Systems	The student records (both academic and tuition/fin aid) side of SOLAR will remain the same. **Students' employee records will exist separately from their Academic record in WolfieONE.**
Hospital usage of Kronos	Will integrate with SUNY system for payroll purposes.
Interfolio	Faculty will be hired in Interfolio and then their data will flow to WolfieONE (Core HR) for onboarding.
HealthStream	The hospital will continue to use HealthStream, and it will integrate with the Learn module of HCM.

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Chart of Accounts (COA)

Terminology

Hierarchy: a structure that provides summarized nodes used to report on all the "children" that fall below it. Oracle gives the ability to rearrange the children values into alternative hierarchies that also summarize the reporting view.

The **parent and child** levels are part of the hierarchy for each segment in the chart of accounts.
The **child** represents the lowest level in the hierarchy. The child values are the values used when entering transactions.
The **parent**(s) represent reporting nodes that group the child values that are found below the parent in the hierarchy. Parent(s) are used for efficient reporting and queries.

Chart Segment: Every segment is a critical dimension in representing some aspect of the business– legal, financial, operational, management – "tagging" every transaction, like a hashtag or a label. The future state "golden rule" is for each segment to have a **single and standard use** for every segment across departments. No "co-mingling" of purposes.

Attribute: acts like a static tag of the chart segments to provide an alternative way to write reports. Example: Academic vs. Non-academic Orgs.

Chartstring: The combined segment values, in a fixed order, is called a chartstring. Every event on a transaction that has a financial impact generates accounting entries, posting it to a combination of segment values in the General Ledger. This illustrates what a chartstring looks like:
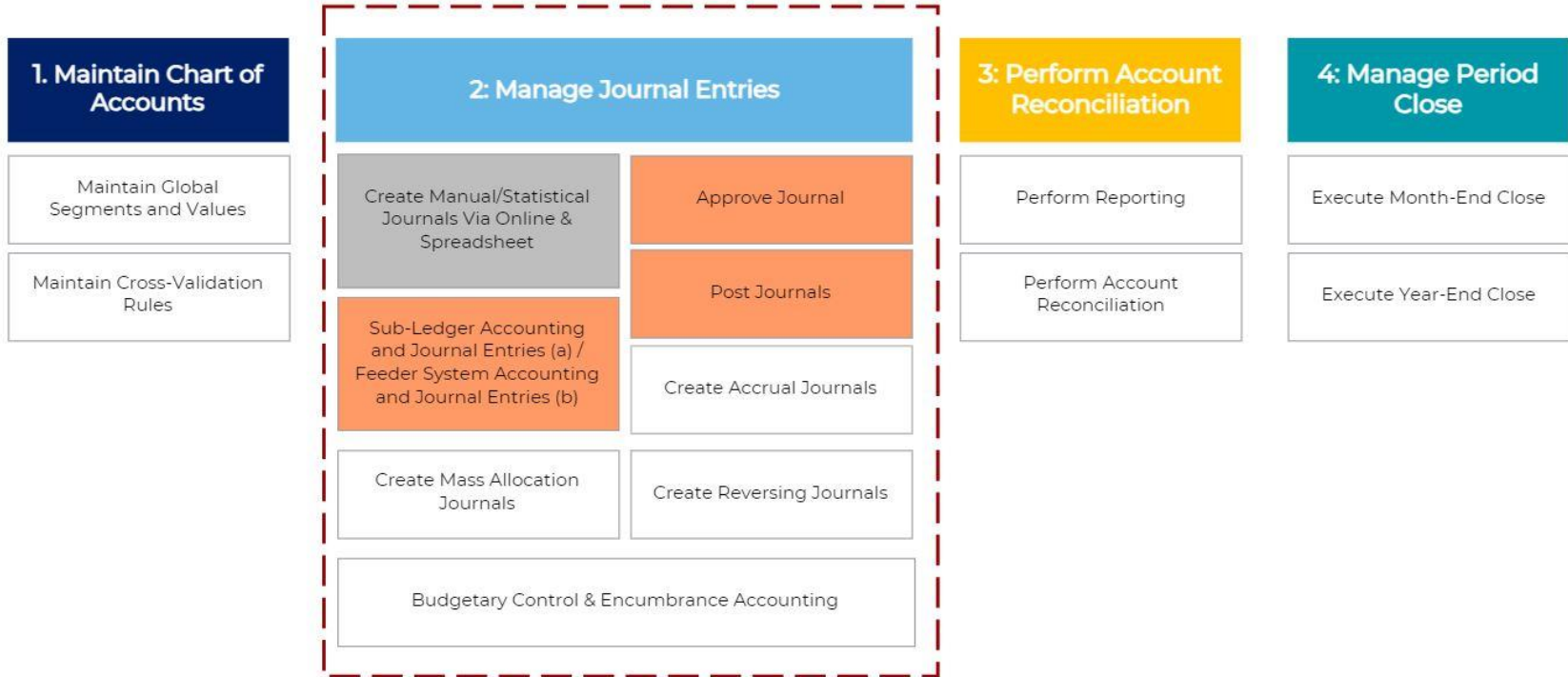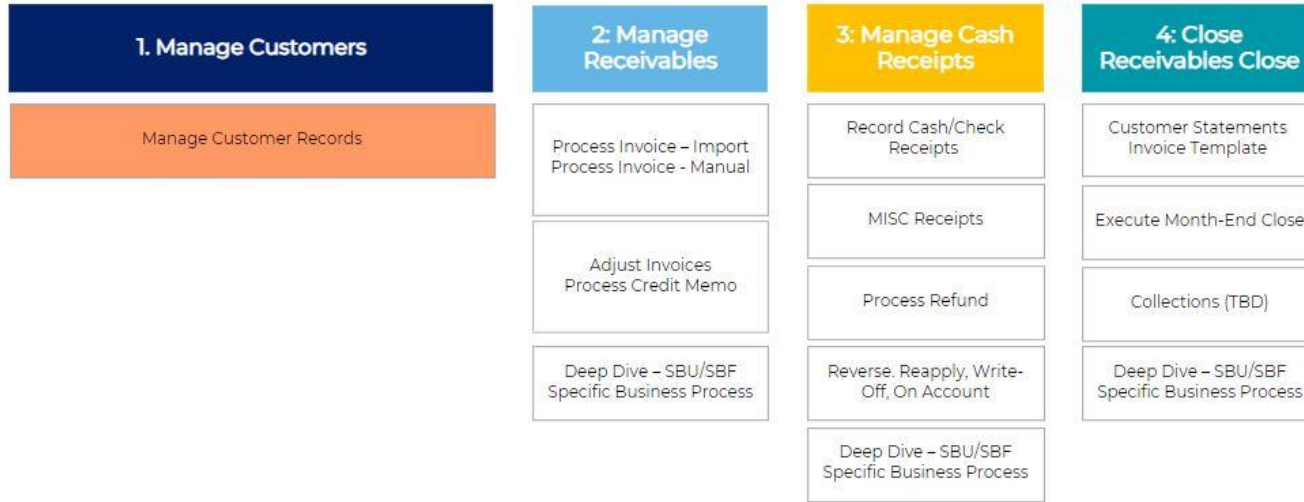

Segment | Delimiter | Combination

XXX.000.0000.YYYYYY.00000.000.0000

Fund   Agency   Program   Natural Account   Project   Intercompany   Future
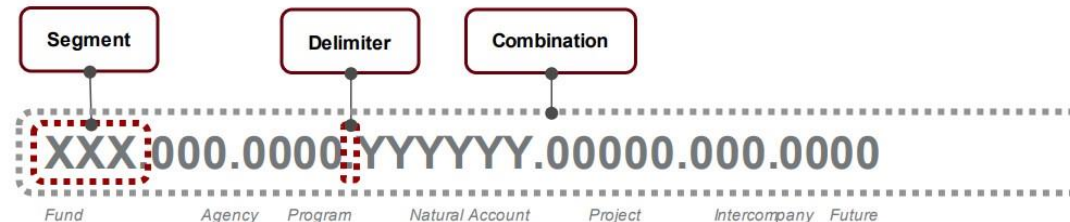
*For illustration purpose only

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Oracle Cloud Overview

ERP General Ledger breakdown

1. Maintain Chart of Accounts	2: Manage Journal Entries		3: Perform Account Reconciliation	4: Manage Period Close
Maintain Global Segments and Values	Create Manual/Statistical Journals Via Online & Spreadsheet	Approve Journal	Perform Reporting	Execute Month-End Close
Maintain Cross-Validation Rules		Post Journals	Perform Account Reconciliation	Execute Year-End Close
	Sub-Ledger Accounting and Journal Entries (a) / Feeder System Accounting and Journal Entries (b)	Create Accrual Journals		
	Create Mass Allocation Journals	Create Reversing Journals		
	Budgetary Control & Encumbrance Accounting			

ERP Receivables (AR)

1. Manage Customers	2: Manage Receivables	3: Manage Cash Receipts	4: Close Receivables Close
Manage Customer Records	Process Invoice – Import Process Invoice - Manual	Record Cash/Check Receipts	Customer Statements Invoice Template
	Adjust Invoices Process Credit Memo	MISC Receipts	Execute Month-End Close
	Deep Dive – SBU/SBF Specific Business Process	Process Refund	Collections (TBD)
		Reverse. Reapply, Write-Off, On Account	Deep Dive – SBU/SBF Specific Business Process
		Deep Dive – SBU/SBF Specific Business Process	

ERP Fixed Assets

1. Maintain Asset Flex Fields	2: Manage Asset Creations	3: Perform Asset Reconciliation	4: Manage Period Close

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ERP Cash Management breakdown

Manage Cash Management
1. Manage Bank Master Data
2: Manage Bank Account Transfer
3: Receive Bank Statements
4: Reconcile Bank Statement

ERP Payables (AP) Refunds only

Types of refunds:
- Student
- Patient
- Department
- AR credit to an external party

Manage Payments
1. Manage Suppliers
2: Manage Period Close
3: Manage Payables Invoices

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EPM

- Systematized central planning and forecasting
- Scholarship Discount Model
- Base / Fiscal Planning
- Overhead and Fringe Cost Planning
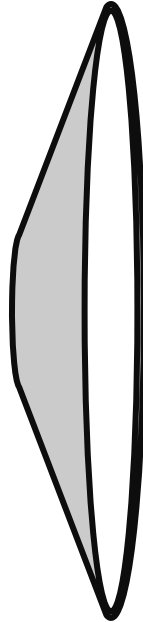
Budget Formulation

Non-Personnel Expenses Entry at COA level; Revenue Entry at COA level; Strategic Planning

Driver-based Revenue Modeling; Target Setting

Budget Management

Multi-year Forecasting/ Projections

Budget Adjustments (COA level)

Commitment Planning

Workforce Planning

Manage Existing Positions
Manage Vacant Positions
Create New Positions
Allocations/ Costing/ Splits

Reporting

Ad hoc Reporting (SmartView)

Narrative Reporting

Management Reporting

Executive Dashboards

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Oracle HCM

Payroll

Compensation

Time & Labor

Recruiting (ORC)

Core HR

Learning

Absence Management

Journeys

Performance

HR Helpdesk

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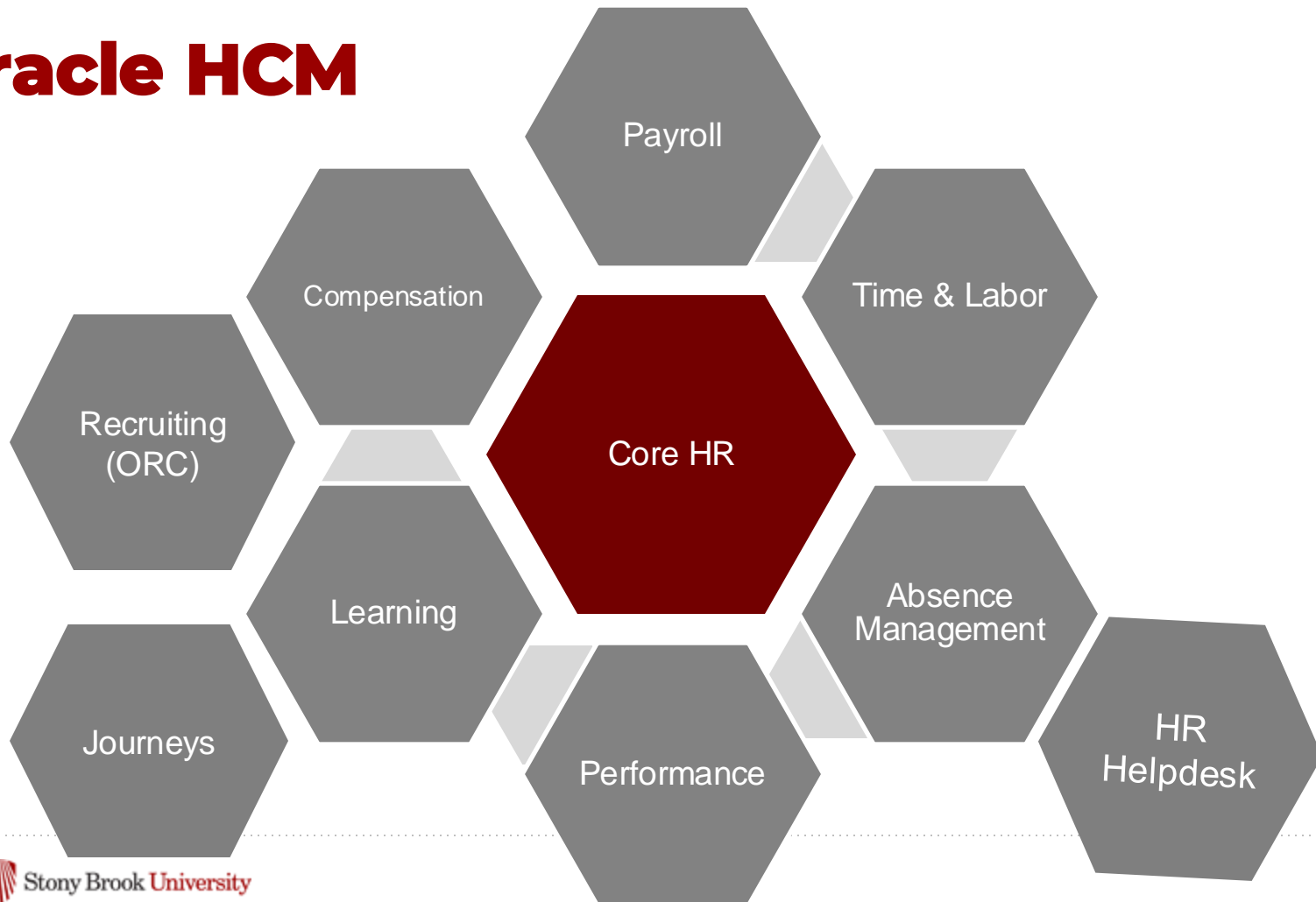
HCM Change Impacts

Human Capital Management Summary

The HCM changes align to the **Guiding Principles, minimizing manual processes and paper forms**, reducing risk or human errors.

Leveraging **guided flows** to show the user what data needs to entered, where, and by whom.

Leveraging **Journeys – a NEW concept –** will improve the employee experience and save time. Examples: Pre-employment check process, onboarding, signing up for benefits (employee self service), Voluntary Reduction in Work Schedule, Offboarding, and any type of leave.

New reports will be available for Managers (both ad-hoc and delivered Oracle reports for HR Administrators and Managers). All fields (including customizable) in WolfieONE are reportable.

Approvals will be in the system, for most processes, **instead of offline via e-mail or paper form**.

The move to Standard Review Period for annual evaluations, making evaluations more consistent (instead of a rolling one-year lookback).

Removing or eliminating use of DocuSign (leveraging Oracle functionality) for most/all (recruiting and onboarding) processes.

Human Capital Management Trends (1)

	Future state
Core HR	This is the support structure for all HCM modules and employee data. New business processes **enhance the overall user experience**. State (University, Hospital, LISVH) and RF employee data will be housed in one **unified platform**. Standard **level of approvals (3)** across all HR processes will **reduce the time** it takes to complete transactions. **Multiple assignment employment model** will accommodate specific scenarios for additional duties and pay elements. **Accountability**: better **visibility into the workflow** (who needs to take action).
Recruiting & Onboarding	**Consistency** of onboarding processes across Stony Brook entities and departments. Standardization of recruiting procedures for staff (excluding Faculty recruitment). Seamless recruiting and **applicant tracking** (instead of having items via e-mail, pdf forms, and items in Taleo or DocuSign). Having an **all-in-one system** (data flows from ORC to Core HR). **End-to-end process in Oracle Recruiting Cloud for staff**. Expediting candidates to new hires, eliminating manual entry (less risk of human error). **Standardized** offer letter & acceptance processes for all ensures a consistent electronic delivery and transparency. Pre-employment check process will be delivered in a seamless manner. Ability to leverage RMI &**Journeys** to ensure candidates complete all their required tasks. Recruiters will no longer use the current requisition templates.

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Human Capital Management Trends (2)

	Future state
Analytics	Leveraging system functionality to **create ad-hoc reports** (tailored to the user's parameters) that can be shared and inherits security from the user role. Every field is reportable. Ability **to leverage hundreds of "seeded" (out-of-the-box) reports, which can be delivered on a scheduled basis**.
Employee Self-service	**Empowering employees to initiate changes to their personal record.** Employees can own and manage their data through an intuitive interface and track the status of their requests. Employees will see their person profile, which includes their own **skills and qualifications**. This eliminates wait times and errors due to manual data entry from paper / email into the system.
Learning Management System	**Automation of training deployment and assessments.** Ability to **centrally host** training resources, **track completion/ measurement** (compliance training analytics) and view all employee training reporting in one **single platform**. Personalized learning recommendations based on **Job Families (Example: HR or Information Technology)**. Flexible course structure supports various learning needs. Allowing managers to assign training to their teams. Social Learning through communities & discussions is a new capability.

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Human Capital Management Trends (3)

	Future state
HR Helpdesk	**Improved customer service:** HR agents will handle, delegate, or escalate tickets. Auto routing of the ticket to the appropriate group and in-system ability to reassign the ticket to another agent. Employees can **view the status** of their tickets. Employees will receive notifications via email when there is an update on their tickets, and they'll have the ability to respond to their tickets both in system or through email. Employee will be able to **look for policies** in knowledge management system, saving time. Based on analytics on the tickets, the project team can proactively work on improving system set-up and processes to improve the user experience.
Performance Management	**Digitalization:** Performance Management will be electronic and consistent for employees. Employees will be able to see their past performance documents in one central location. New ability to send **performance documents through automation** (or trigger the performance program manually). **AI functionality** to summarize reviews (managers will still have final authority). Check-ins, Feedback Request, Goals as expectations will be new concepts. Approval (in system) will route to HR and Employee Relations. Manager Self-Service and Employee Self-Service will be crucial to the performance and goal process.
Manager Self-service	In-system approval workflows for all HCM modules: **Empowering managers to review and take actions** on their direct and indirect reports, **fostering autonomy and accountability**.
Compensation Administration	**Better analysis of salary surveys at the job level enables the institution to calculate the most appropriate salary** for the job market. Automation of **compensation rosters** to perform salary increases, such as across-the-board merit increases, within WolfieONE. **Discretionary raises** will be done within the system without the manual intervention (creating and dispersing spreadsheets). VP Areas will no longer need to split out and send spreadsheets and then collect them for submission to HR.

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Human Capital Management Trends (4)

	Future state
Payroll	Employees will **enter their own bank details** into WolfieONE for direct deposit. **Payroll/Labor costing:** splitting costs when the employee's salary is going to be funded from different sources (Different initiatives or **fund sources**) RF employees do not currently have labor costing in PeopleSoft , RF employees labor distribution will be integrated into WolfieONE, improving reporting capabilities. New nomenclature and processes will require training, such as "update" vs. "correct", and "save" vs. "submit".
Absence Management	*University:* Absence Management is a separate functional area from Time and Labor of WolfieONE, which will pull data from Core HR and Time and Labor **to calculate accruals**. HR administrators will need training on entering leaves that were approved outside the system. Employees will need training on the **absence attestation.** Employees will be able to **submit time off requests to their managers, and if approved will automatically be added to their timecards in Time and Labor.** *Note: Hospital and LISVH employees* will enter absences in Kronos system (no change).
Time and Labor	*University:* **this module will replace paper and SOLAR time entry**. Review and approval will take place in the system before payroll processes. **Managers will need training on approvals.** All employees will require **training on logging their time, including lost time due to absences**. The policy around time entry for terminations will change: the **last day of work will be the last day employees can log their time.** Entering time **promptly** upon deadlines will impact other modules, Employee should submit time sheet on time or managers have to submit the timecard on behalf of teams. Additional pay components (overtime, meals, compensatory time) will be calculated automatically and sent to external payroll systems (EBS and Payserv). HR Administrators must review the dashboard to know the group time cards statuses, fix the errors if any. (data verification for new hire/termination/transfer cases). *Hospital and LISVH employees* will enter time in Kronos system (<u>no change</u>).

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Current State: a combination of emails, attachments, paper forms, and SOLAR

Manager Self-service Future State:

Employee Self-service Tiles

ERP Change Impacts

ERP Change Impacts

	Future State
Cash Management	**All workflows will be new.** Oracle allows for **Automated reconciliation, NET NEW** processes. ONLY impacts central accounting.
Fixed Assets	Ability to upload or manually add, manage, depreciate, and track fixed assets in WolfieONE. **Net new processes** will require training. **Gaining visibility into assets** value/depreciation/financial details, automation of data capture and reporting.
Payables (AP)	Leveraging functionality for **patient refunds, student refunds, travel reimbursements** and department refunds (departments refunding a customer that they billed through AR). Moving to Oracle Cloud. **1099/1042** Reporting and Withholding will be new for **SBF** and will require training.
Receivables (AR)	- **New processes will require training: invoicing external clients, balance reconciliation** (not done in the current state), **creating invoices in ERP, creating and applying receipts**, using *infolets* and *watchlists*. - **Decentralized AR model** distributes the workload across department (for external invoices) and improves accountability while requiring more unit level training - Increased **visibility into external billings and better financial reporting** - Data natively integrated with the General Ledger, enabling the tracking of external receivables, aligning with our *Optimized Operations & Processes* principle. 34
General Ledger (GL)	Net new processes will require training. - Create, post, review and query journal entries in Oracle Cloud. **Entering and posting transactions on time** or more frequently is key to having accurate financial statements. The importance of entering/updating data in a timely manner is a key training piece. - Moving away from PS Query and NVISION, replacing those reporting tools with ERP seeded reports, OTBI and SmartView tools for financial reporting. - New concept: which **Business Unit** in which to transact and which values to select. **Increased coordination and standardized maintenance with HR is paramount, because the org structures are shared**.

Personas

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OFFICE OF CHANGE MANAGEMENT

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Personas (1)

As a Change Champion, it is important for you to know and communicate to your peers:

- Personas can have **multiple Oracle Cloud custom roles** (your department will be helping DoIT, HR, BFP&A and the Office of the Controller in mapping the right roles to the personas)
- Training (learning pathways) is aligned with personas

> **/per·so·na/** A **fictional character** designed to represent a **segment of stakeholders** who might interact with a process, service or product in a similar way.

Examples of HCM Personas

Manager

- Manage a team
- Onboarding support
- Generate reports
- Evaluate performance
- Assign learning content
- Fill vacancies

- **PAIN POINTS:** manual paper forms, having to ask DoIT or HR Administrators to perform a transaction for their direct reports

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Employee

- View Personal and Employment information
- Complete required training for compliance
- Update personal records
- View pay slips
- Understand performance metrics and access their yearly review
- Complete I-9

- **PAIN POINTS:** Having to ask DoIT or their Managers to change their personal data; Manual paper forms (timekeeping, leave requests, disjointed onboarding tasks)

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Personas (2)

/per·so·na/ A fictional character designed to represent a segment of stakeholders who might interact with a process, service or product in a similar way.

General Ledger Manager

- Review requests for changes to COA
- Specify cross validation rules or security rules
- Review/approve journal entries
- Approve adjustments and close the period
- Supervise GL Accountants
- Oversee changes to policies and to GASB, FASB accounting standards
- Business process documentation steward
- For SBF: manage external audits and multiple state tax filings
- Responsible for 1042 and 1099 reporting
- Develop leaders within the team

- **PAIN POINTS:** system limitations, reconciliation issues, process control issues, manual processes, missed month end close deadlines, spending too much time on finding documentation.

General Ledger Accountant

- Create Manual journals & Recurring journals
- Upload third party journals
- Reconcile unposted entries
- Review and create month-end reports
- Process month-end and year-end adjustments
- Perform period-end activities
- Resolve discrepancies or irregularities in records
- Account reconciliation within the system and the boundary systems
- Ensure financial data is recorded in the appropriate period (accruals, deferrals, prepaids)
- Review and post journals
- Review/Approve reimbursements (Concur)

- **PAIN POINTS:** Delays in sub-ledger closing and reconciliations
- Spending too much time on finding documentation and chasing people for approvals/sign-offs
- Limitations with current system, inconsistent tools
- Too many types of journals from various sources
- Lack of governance of the chart of accounts.
- High volume of cost transfers to balance budgets

Billing Clerk

- Professionals with understanding of billing processes and experience using billing software
- Responsible for generation and delivery of invoices to customer, managing the related corrections and reconciling customer payments and invoices
- the review of revocable permit contracts received from AP office
- Running reports

- **PAIN POINTS:** Not receiving communication on delayed billings and appropriate approvals on correction entries such as credits and adjustments
- Lack of time and resources to work with customer to build relationship and collect payments
- Incorrect or outdated billing rates for Service Center.

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Next Steps

Change Champion Journey Phases

Learn about **new functionality and processes**. Then, share the benefits using OCM materials to educate peers.

Design	Build				Test	Train

NOW: Schedule time in your "local" meeting, OR offer to host one.

Send an email to your peers or counterparts introducing yourself and select excerpts from recent eNewsletters to copy onto the email with a note explaining why this is interesting or relevant.

Jan 2025: **HR Changes** meeting-in-a-box from OCM team, with a focus on **Employee Self Service** (ESS) and how Learning (LMS), and Oracle Recruiting Cloud (ORC) will enhance the **employee experience.**

Feb 2025: **Manager Self Service (MSS),** meeting-in-a-box, and how performance management and time and labor will be leveraged by managers.

March 2025: **New COA:** with a focus on educating targeted audiences on **segment definition,** single use for each segment and sharing some relevant **examples**.

April 2025: Champions to help **increase in the number of respondents** to the **Mid-Point Change Readiness Survey** (as compared to the Baseline Readiness Survey - before the launch of the Champion Network)

OCM team delivers a new action plan for the next 3 months.

Fall 2025: Change Champions will gain access to Oracle to familiarize themselves with the interface and prepare to participate in testing.

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Next Steps

1. Review the Champion Toolkit - **WolfieONE Champion Website**
2. Identify audiences you would like to share WolfieONE information with. Check with other Champions to ensure there is no duplication of effort.
3. Check the **Events Calendar** - https://docs.google.com/spreadsheets/d/e/2PACX-1vRfh3gdssAkKI1wsKb3Yh6eymQI_akkGQlcxxoct6l3473czJrNmJmixn-fPbT0FOQ2b94pFuFqi4pJ/pubhtml
4. Request time on meetings you can join and add to the Events Calendar using this link - https://docs.google.com/spreadsheets/d/1mFG-WrT48Kv5aorcH1-l67ptIqDkQpP0UKiOjXU0_JE/edit?gid=2023941331#gid=2023941331
5. Review material to present (will be shared in the Champion Toolkit)
   1. Jan 2025 – Employee Self-Service (ESS)
   2. Feb 2025 – Manager Self-Service (MSS)
   3. March 2025 – COA
6. The expectations are uniform from **all Champions** (managers, direct reports)
7. Communicate with us – we love to hear from our Champions

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OCM Website:

https://www.stonybrook.edu/commcms/change-management/change_intitiatives/Current_Initiatives/WolfieONE/change_network/WolfieONE_Champion_Toolkit

Appendix

Our Executive Sponsors

WolfieONE

Simeon Ananou
CIO and VP of the
Division of Information Technology

Carl Lejuez
Provost and Executive
Vice President

William Wertheim
Interim Executive Vice President for
Health Sciences and Stony Brook Medicine

Jed Shivers
Senior Vice President for
Finance & Administration

Carol Gomes
Chief Executive Officer, Chief
Operating Officer, SB Hospital

Dr. Gerald Kelly
Chief Information
Officer, SB Hospital

Stony Brook University

Our Steering Committee

WolfieONE

Braden Hosch
VP for Educational and
Institutional Effectiveness

Cassie Amadio
AVP for Accounting and
University Controller

Colette Brown
Chief HR Officer
Stony Brook Medicine

Heather Montague
Senior AVP for Budget and
Financial Planning

Hina Kausar
Director, Office of Change
Management

John Hennessey
Chief Applications Officer,
Stony Brook Medicine

Lyle Gomes
Vice President for
Finance

Tracey McEachern
AVP HR Operations,
Services, and Payroll

Dennis Gallagher
CTO, Medical Information
System

Stony Brook University

HCM Learning- Screenshot

Sample Journeys – Landing Page Tiles

Sample Journeys- HCM Screenshot
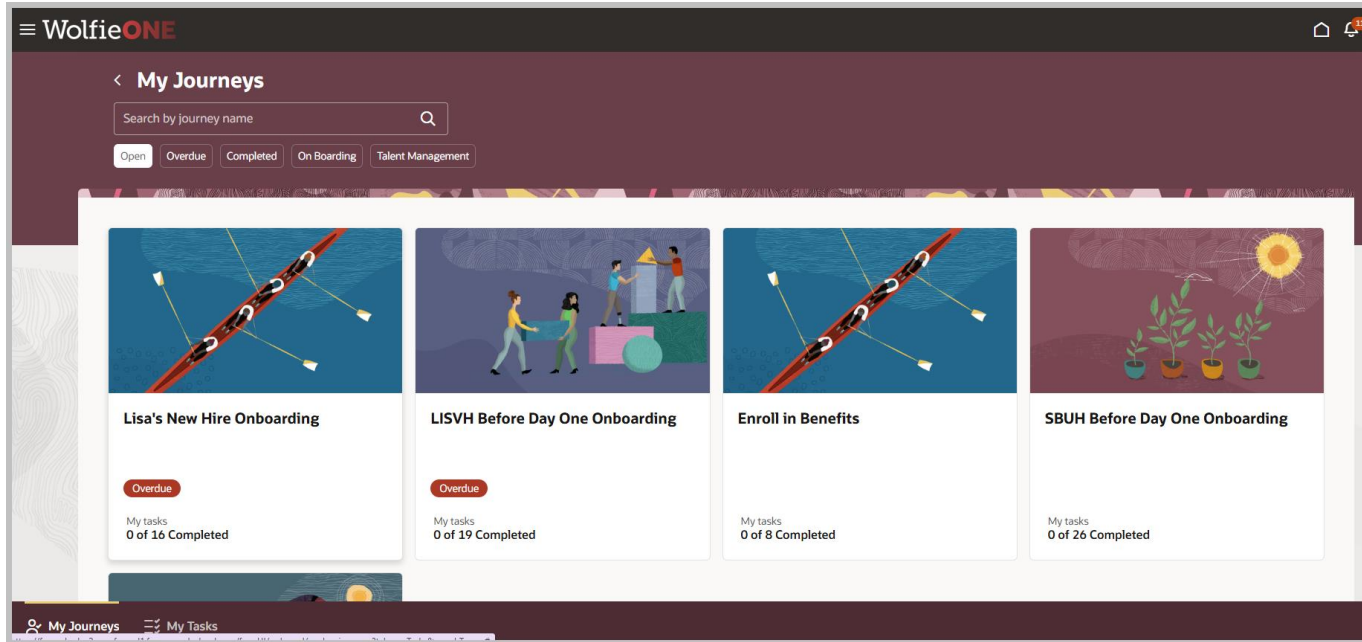
We can develop eligibility profiles around Journeys (If I meet that criteria, then the Journey is assigned to me). The Manager can assign journeys, via Manager self-service.