



Cross-Functional CRP Overview

Position – WFA – Payroll – GL

December 2017

Introductions

- UCPATH is...
 - A system-wide initiative to implement a single solution for Payroll, Benefits, Human Resources and Academic Personnel systems

- Our Team's Goal is...
 - To help UC Berkeley transition successfully to the new UCPATH System

- Today's Presenters are...

- Other Team Members here today are...

We are here to support you every step of the way!

Objectives for Today

- To debrief on Conference Room Pilot sessions (CRP), including:
 - Cross-functional overview of future state system design, business process and roles
 - UCPATH concepts, definitions and guidelines for your business area
 - Key elements, data conversion issues and significant changes
- To enable participants with tools, information and context to begin:
 - Defining UCB roles, responsibilities and workflow
 - Identifying gaps between current state and future state
 - Designing future state business process alignment
 - Configuration and conversion analysis
- To establish our working relationship founded on:
 - Collaboration
 - Communication
 - Partnership



Agenda

Position Management

Workforce Administration

Payroll

General Ledger

- Overview / Business Context
- Business Process, Roles & Workflow
- Summary of Future State Changes
- Next Steps for Our Working Partnership



Position Management

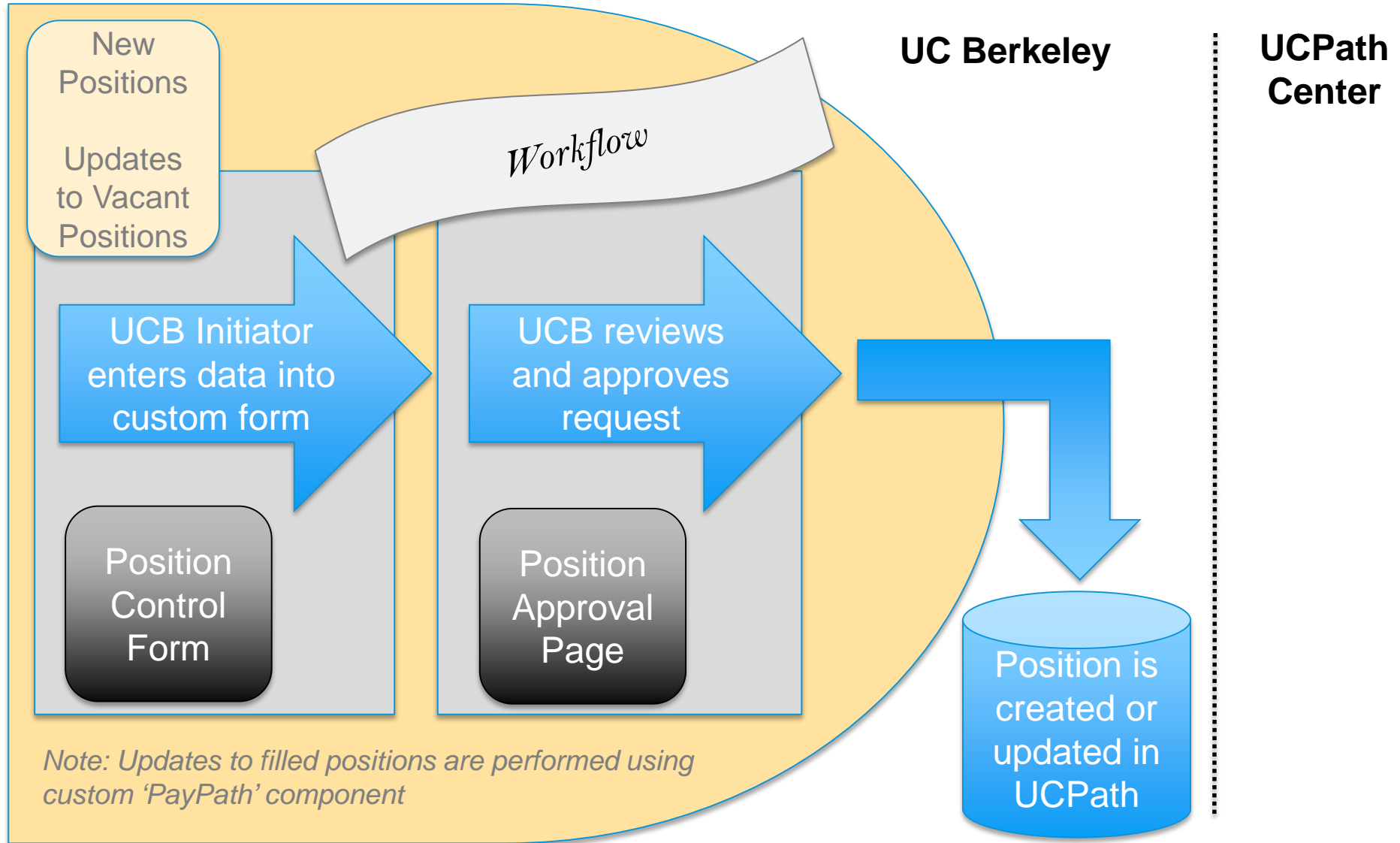
CRP Overview

TBD

Position Management Overview

- A position represents a filled or vacant role in a department
- Examples of Position data include Department, Job Code, Salary Grade, Reports To Position, Headcount (number of incumbents) and ERC
- Employees are hired into positions by using a Position Number to pull Position data into employee's Job record
- Most updates to Position data flow into incumbent's Job record automatically
- Funding is connected to Position in future state
- Creation and maintenance of Position Data is a UCB responsibility, with little to no involvement of UCPath Center

Position Management Business Process



Position Management Roles

- New Self-service Roles with Workflow using Position Control Form
 - Initiator Role
 - Completes form to request new positions and updates to existing vacant positions
 - View Only access to Position Data
 - Approver Role
 - Approves, denies, pushes back requests submitted by Initiator
 - View Only access to Position Data
 - Position Control Form
 - Customized version of Position Data; overall same information as in full Position Data
 - Used by Initiator in Self-service process with approval workflow
- Administrator Role with direct entry to Position Data and no workflow
 - Creates new positions, updates vacant positions, has Correction capability

Self-Service Path with Workflow

1. Initiator enters data into Position Control Form and submits for review
2. First level Review/Approver
 - Receives an email that a transaction requires approval
 - Approver can select email link, or see item in UCPATH Worklist
3. Passes to 2nd level of approval, if configured
4. Final approval creates new Position and assigns Position Number

Business Rules and Guidelines

- All employees, and CWRs who supervise others, will be in a Position
- Reclassification can be used to change a position to different title within same series – repurposing requires deactivating and creating new position
- A position may be moved from one Department to another if role is being transferred – otherwise required to inactivate position and create new one
- Position Pools (grouping positions) will be used for Work Study programs and established with UCPath PMO guidance prior to go-live
- Position Pools may be used optionally for other types of positions
- Position numbers will be sequential with all campuses using same numbering system
 - Legacy positions will receive new sequential numbering during conversion/deployment
 - A crosswalk table will be provided that maps legacy position number with new position

Position Headcount Guidelines

- Multi-headcount (one position – multiple incumbents)
 - Meant to be used only for Non-career, Non-represented positions
 - Must share BU, Dept. Job Code, Salary Plan/Grade, Reports To, FLSA, Funding
 - Employees with those attributes will convert into multi-headcount positions (e.g., students and floaters)
- Single headcount (one position – one incumbent)
 - Meant to be used for most regular positions
 - New component for efficient updating of Position-Job-Additional Compensation ('PayPath') can only be used for single headcount positions
 - Updates to Position Funding can safely be done without concern for inadvertently updating funding of other incumbents

Summary of Future State Changes

- Introduction of Self-service roles and approval workflow will require:
 - Definition and assignment of roles
 - Workflow approval path design
 - Business process alignment with current state
- Funding is tied to Position and entered/maintained in Commitment Accounting:
 - Requires new understanding of relationship of funding to Position/Job/Payroll/Labor Distribution/General Ledger flow
 - Likely will entail new or changed roles and responsibilities, potentially involving Budget/Financial staff
- Single headcount positions preferred for most positions, in order to use PayPath and to facilitate Position Funding updates

Add/Update Position Request

Navigation: Favorites ▾ Main Menu ▾ > UC Customizations ▾ > UC Extensions ▾ > Position Control Request

ORACLE®

Home | Worklist | Performance Trace | Sign out

All ▾ Search >> Advanced Search

New Window | Help | Personalize Page

Add/Update Position Request

Transaction Type

☒ Add New Position ☐ Update Vacant Position ☐ Review Transaction

Next >>

Draft Transactions

Personalize | Find | View All | 1 of 1 | First | Last

Select	Transaction ID	Effdt	Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To	Update
1 <input type="checkbox"/>										<input type="button" value="Update"/>

Description Tab

Description | Specific Information | UC Position Data | Supporting Documents

Position Information Find | View All First 1 of 1 Last

Position Number NEW Transaction ID 1111111111

Headcount Status Current Head Count 0 out of 0

*Effective Date 10/16/2017 Approval Status Initial *Status Active Initialize

*Reason NEW New Position

*Position Status Approved Status Date 10/16/2017 Key Position

Job Information

*Business Unit IRCMP UC Irvine Campus Manager Level All Other Positions

Job Code 000333 TRAINER 5

Reg/Temp Not Applicable Full/Part Time Not Applicable

Shift Not Applicable Union Code 99 Non-Represented

Title TRAINER 5 Short Title TRAINER 5 Detailed Position Description

Work Location

Reg Region USA United States

Department IR8068 Instruction and Research Company UCS University of California

Location B1A-1 B1A - Tower - 1st Floor

Reports To Dot-Line

Specific Information Tab

Description

Specific Information

UC Position Data

Supporting Documents

Position Number NEW

Transaction ID 1111111111

Headcount Status

Current Head Count 0 out of 0

Specific Information

Find | View All

First 1 of 1 Last

*Effective Date 10/16/2017

Status Active

Max Head Count 1

Mail Drop ID

Work Phone

Health Certificate

Signature Authority

Incumbents

☐ Update Incumbents

☐ Include Salary Plan/Grade

☐ Include FTE

☒ Budgeted Position

☐ Confidential Position

☐ Job Sharing Permitted

☐ Available for Telework

Education and Government

Position Pool ID

Pre-Encumbrance Indicator No Encumbrance

Encumber Salary Option Salary Grade Minimum

Classified Indicator Management & Sr Professional

Calc Group (Flex Service)

Academic Rank

FTE 1.000000

Adds to FTE Actual Count

UC Position Data Tab

[Description](#) | [Specific Information](#) | [UC Position Data](#) | [Supporting Documents](#)

Position Number NEW

Transaction ID 1111111111

Headcount Status

Current Head Count 0 out of 0

Employee Relations Code

Find | View All First 1 of 1 Last

*Effective Date 10/16/2017 31

Status Active

HR Group

*Employee Relations Code

Special Training Code

Personalize | Find | 1 of 1 First Last

*Special Training Code	Description
1	

Representation Code

Personalize | Find | 1 of 1 First Last

Security Clearance Type	Description
1	

Save for Later

Cancel

[Description](#) | [Specific Information](#) | [UC Position Data](#) | [Supporting Documents](#)

Supporting Documents Tab

Description | Specific Information | UC Position Data | **Supporting Documents**

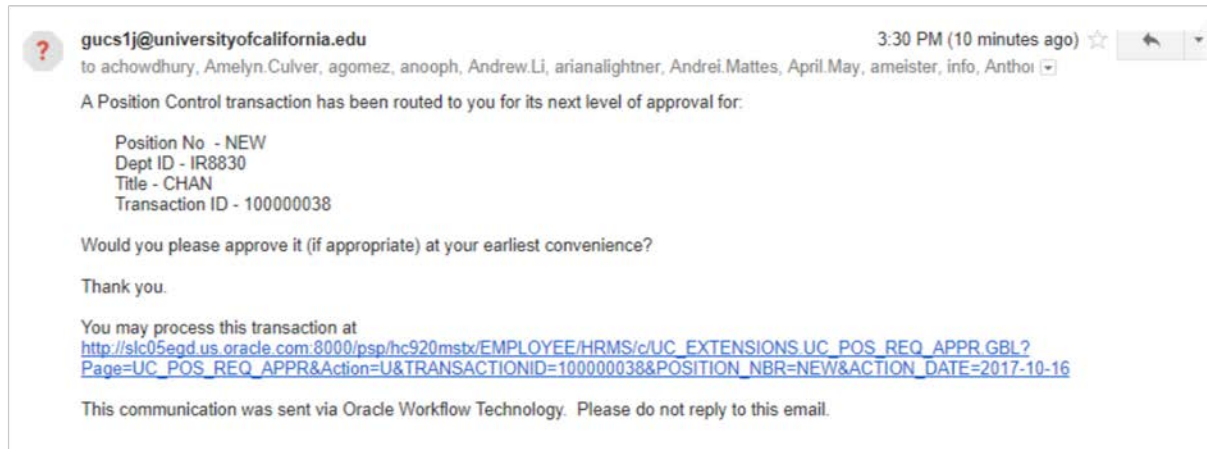
Transaction ID 1111111111

Personalize | Find | View All | First 1 of 1 Last

Position Number	Effective Date	Action Reason	Operator ID	Unique Sys Filename	DateTime Stamp	Attached File	Add Attachment	View Attachment	Delete Attachment
1 NEW		NEW					Add Attachment	View Attachment	Delete Attachment

Save and Submit Save for Later Cancel

Approval Email



Position Approval Page

Favorites ▾ Main Menu ▾ > Worklist ▾ > Worklist > Position Control Approval

ORACLE® All ▾ Search >> Advanced Search Last Search Results

Approve Position Request

Transaction Information

Transaction ID	100000062	Approval Status	Pending	Created By	UC_JOH
----------------	-----------	-----------------	---------	------------	--------

Position Control Information Find | View All First 1 of 1 Last

Position Information

Position Number	NEW	Effective Date	10/18/2017	Position Status	Approved
Status	Active	Reason	NEW		

Job Information

Business Unit	IRCMP	UC Irvine Campus	Full/Part Time	Fixed
Job Code	003252	POSTDOC-EMPLOYEE		
Union Code	PX	Post Doctoral Scholars		Position Description

Work Location

Department	IR7457	Obstetrics and Gynecology
Location Code	B22C-3	B22C - 3rd Floor
Reports To	40000052	ADMIN OFCR 4 GF

Salary Admin Plan

Sal Plan	T023	Salary Grade	L5	Step
----------	------	--------------	----	------

Salary Ranges

Minimum	Midpoint	Maximum
---------	----------	---------

Specific Information

FLSA Status	Exempt	FTE	1.000000
Mail Drop ID		Max Head Count	1
Budgeted Position	Y	Health Certificate	
Position Pool ID		Classified/Unclassified Ind	Academic

UC Position Data

HR Group		Representation Code	Covered
Emp Rel Code	AllOthers		

Special Training Code Personalize | Find | First 1 of 1 Last

Special Training Code	Description
1 S	SHP Required

Security Clearance Personalize | Find | First 1 of 1 Last

Security Clearance Type	Description
1	

Approve Deny Supporting Documents

Comment

POS Stage 10

WL Tran ID: 100000062, Position: NEW, Effective Date: 2017-10-18: Pending

Position Control

Pending

Multiple Approvers

UC AWE Approver 01

Return to Search



Workforce Administration

CRP Overview

Workforce Administration in UCPath

UCPath introduces two new tools for Workforce Administration transactions:

HR Templates

Hires
Rehires
Transfers
Add Concurrent Job
Terminations
Personal Data
Add / Renew CWR

PayPath

Updates to Position, Job
and Recurring
Additional Pay, e.g.:

- Promotion
- Job Reclassification
- Reports To Change
- FTE Change
- Appointment Extension
- Pay Rate Change
- Short Work Break
- Add a Stipend

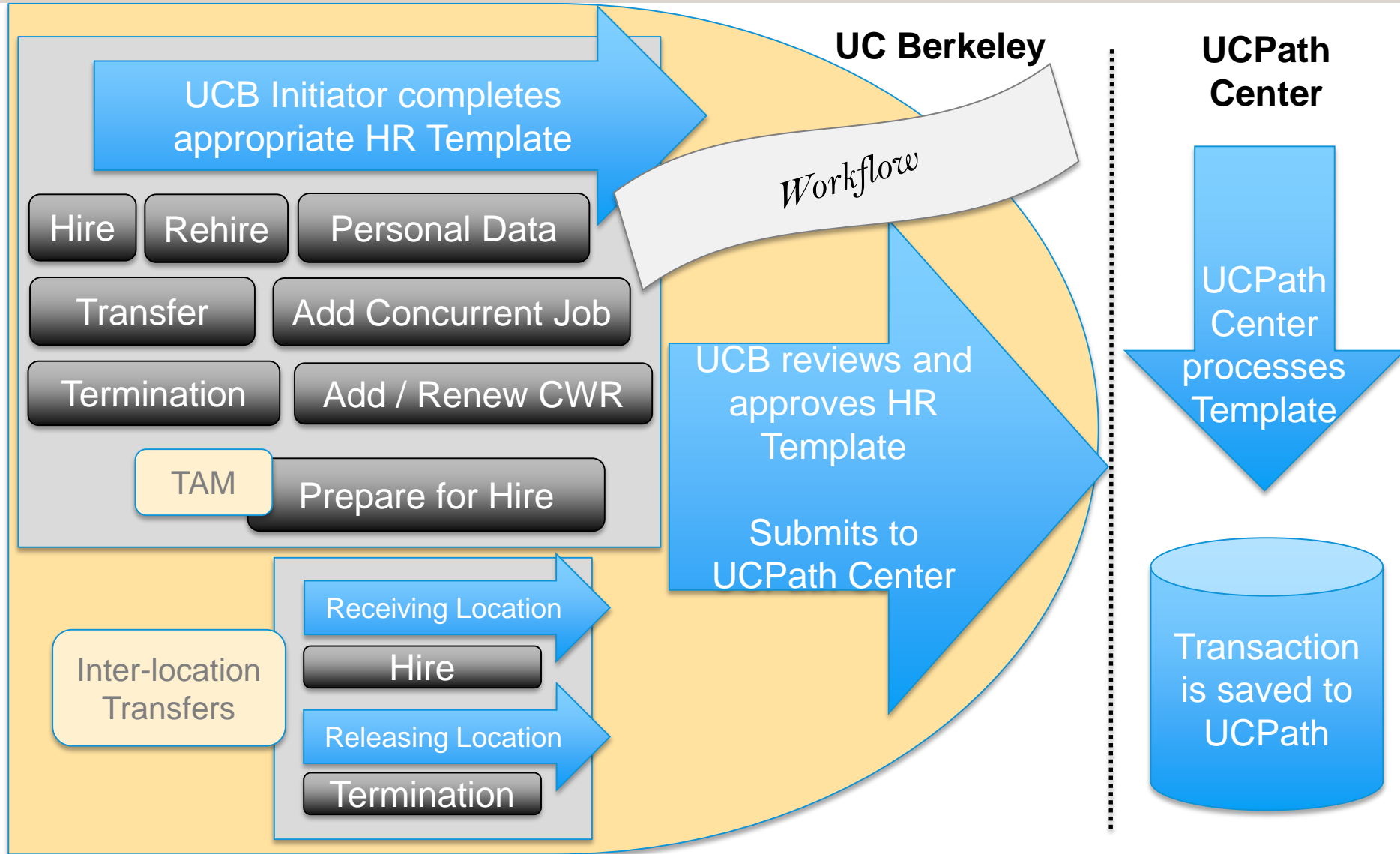
HR Templates Overview

HR Templates

Hires
Rehires
Transfers
Add Concurrent Job
Terminations
Personal Data
Add / Renew CWR

- UCB will enter data into custom UCPATH templates to initiate most major HR transactions
- Templates are routed for UCB review and approval using workflow, then submitted to UCPATH Center for final processing into Person and Job records
- Templates consist largely of same information required for HR transactions on Job and Person data in current state HCM, with some additions and differences as well as fewer Save-Edits and system-enforced rules
- UCPATH Center will reject an incomplete template, though campuses can clone transaction for resubmittal
- Working with UCPATH templates will require a high level of business process and transactional knowledge and strong understanding of Person, Job and Compensation data
- UCB will need to identify appropriate staff for Initiation, Review and Approval roles, and define workflow approval paths for each template

HR Template Transaction Processing



HR Templates

- ☐ Full Hire – Staff
- ☐ Full Hire – Academic
- ☐ Rehire – Staff
- ☐ Rehire – Academic
- ☐ Concurrent Hire – Staff
- ☐ Concurrent Hire – Academic
- ☐ Intra-Business Unit Transfer – Staff
- ☐ Intra-Business Unit Transfer – Academic
- ☐ Voluntary Termination
- ☐ Involuntary Termination
- ☐ Personal Data
- ☐ Retirement
- ☐ Prepare for Hire
- ☐ Add CWR
- ☐ Add CWR w/ Position
- ☐ Extend CWR Appointment
- ☐ Extend CWR w/Position
- ☐ Complete CWR
- ☐ Renew CWR
- ☐ Renew CWR w/Position

HR Template Roles & Workflow

1. UCB Initiator completes appropriate template and submits for review
2. First level Review/Approver
 - Receives an email that a transaction requires approval
 - Approver can select email link, or see item in UCPATH Worklist
3. Passes to 2nd level of approval, if configured
4. Final approval submits template to UCPATH Center for final processing
5. Transaction is saved to UCPATH
6. UCPATH Center attaches appropriate checklist for transaction
7. UCB completes items on checklist (e.g., documentation, signatures)

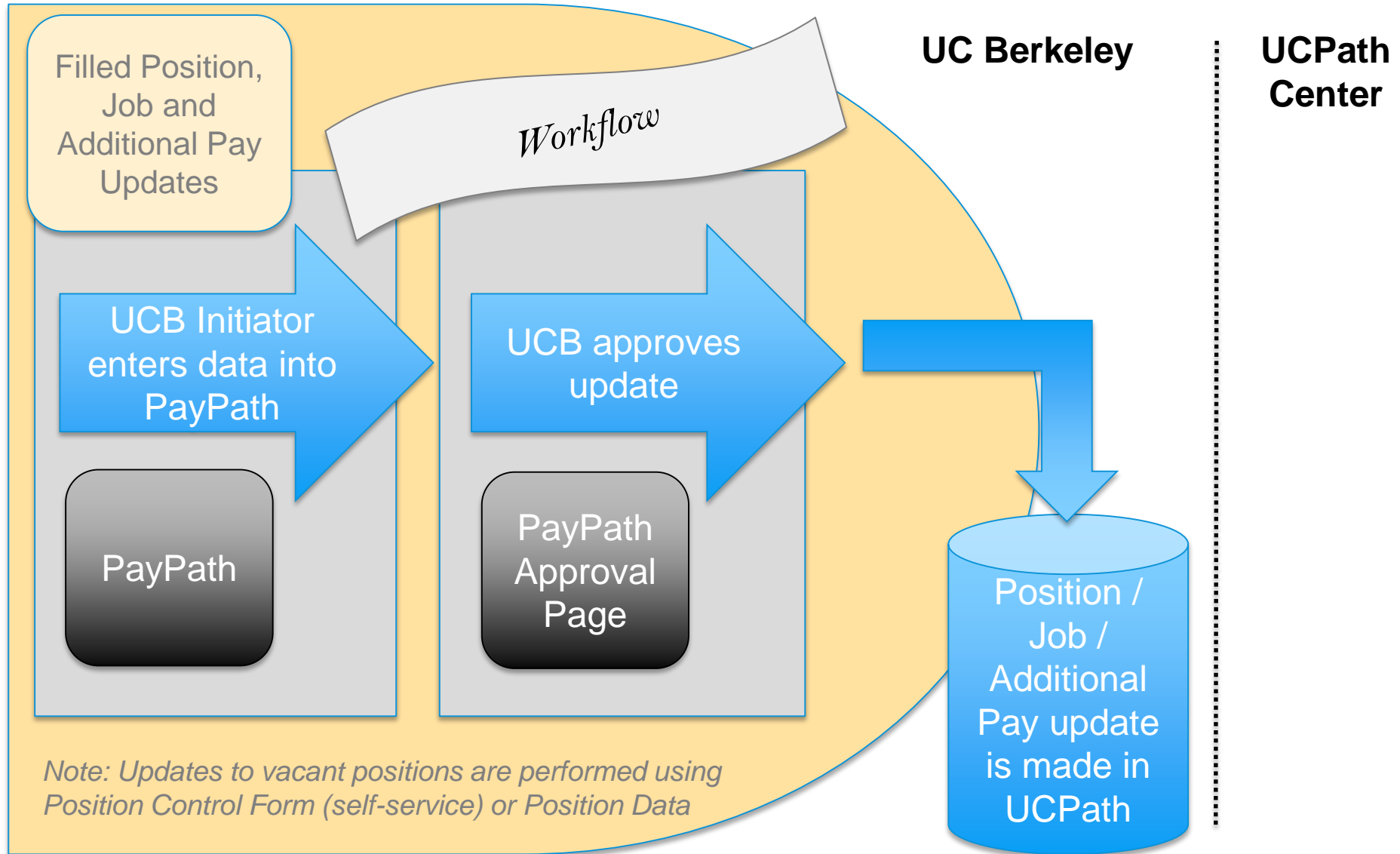
PayPath Overview

PayPath

Updates to
Position,
Job and
Recurring
Additional
Pay

- Custom component for performing individual or mass updates to Position, Job and recurring Additional Pay in one transaction (*single headcount Positions only*)
- Mass update process involves entering data into a complex spreadsheet which UCB uploads to UCPATH or places on server for pickup and upload in nightly batch
- Upon UCB approval, PayPath updates are processed directly into UCPATH as live transactions – no involvement of UCPATH Center
- Both individual and mass updates use custom workflow based on departmental security plus Initiator and unique PayPath Approver roles
- Both will require a high level of business process and transactional knowledge and strong understanding of Person, Job and Compensation data, as well as Academic components of pay (for Academic processing)
- Mass Update spreadsheet processing, upload and approval will require advanced knowledge and training: *Super Users only*

PayPath Business Process



Hires & Rehires

- UCPath Center will assign a New Hire Checklist when record is saved and employee ID is generated
- UCB will complete New Hire paperwork and update corresponding fields on New Hire checklist within appropriate timeframe
- If not included on template, UCB will verify employee signed State Oath and Patent Acknowledgement and completed I-9
- Supporting documents can be attached to template (e.g., UFIN), but New Hire paperwork and personnel file stays at UCB
- Once a template is processed, employee is set up to begin receiving pay
- Former employees with break in service before 18-month conversion cutoff will have no record in UCPath – must be processed as a New Hire

Inter-Location Transfers

- Defined as when an employee leaves one UC location to take a new job at another UC location with no break in service
- Processed as Hire – Termination so both locations retain access to their respective records:
 - Receiving location: Action/Reason 'Hire/Transfer-Inter-location BU'
 - Releasing location: Action/Reason 'Termination/Inter-location BU'
- Locations are expected to coordinate with each other for related processes, transfer of documentation, UFIN, etc.

Terminations

- Termination template must be submitted for each job record to be terminated (exception is Retirement, where UCPath Center will verify and terminate all jobs)
- UCB will assign and update appropriate separation checklist
- UCB is responsible for managing and maintaining separation packets including UI form and Termination Benefits checklist
- UCB will retain documentation per records retention policy and procedures
- UCPath Center HR/APO Support Manager will work with UCB regarding highly sensitive terminations that do not meet documented standard process
- Related Benefits and Payroll follow-up processes are covered in separate business process design documents and flowcharts (e.g., Death Pay, Final Pay)

Personal Data Changes

- Administrators use Personal Data HR Template to update Personal Data on employee's behalf
 - Uses approval workflow
- Employees may update their own Personal Data using Self-Service functionality
 - Access is through custom UCPATH portal
 - Approval and follow-up documents are required for changes to Name, Gender

UCPath Personal Data and Job Data Pages



**UCB will have
VIEW ONLY
access**

Personal Data

- Biographical Details
- Contact Information
- Regional
- UC Person Data

Job Data

- Work Location
- Job Information
- Job Labor
- Payroll
- Salary Plan
- Compensation
- UC Job Data
- Employment Data
- Earnings Distribution
- Benefits Program Participation

Mass Hire Batch Upload Process



NEW

- Intended for Hires of 50 or more
- Can be used for Hires and Concurrent Jobs, but cannot be used for any records requiring creating of JED or Additional Pay at time of Hire
- UCPath Center will upload a template completed by UCB and placed on file server; custom nightly batch process will load files with Person and Job Data
- UCPath Center will review and address errors in staging table before loading; errors that cannot be resolved by UCPath Center will be referred back to UCB
- Does not have workflow
- One template with Position Data, one without Position data
- New Hire checklist will automatically be assigned

Short Work Break (SWB)



- Used to temporarily stop pay during work break period while employee remains in Active status, for example:

Class	Type
Staff	Partial-Year Career Furlough
	Floater
	Limited
	Undergraduate Students
Academic	Academic Students
	Unit 18- Benefits Bridge Eligible
	Unit 18- Benefits Bridge Not Eligible
	University Extension (UNEX)
	Variable Appointment
	Research Funding Bridge

- UCB will be responsible for monitoring employees on SWB and taking appropriate action to return employee, extend appointment or terminate job
- UCPath Center will monitor SWB Audit Report to identify SWBs that exceed criteria and will work with UCB to confirm appropriate course of action

Auto-Termination of Jobs with End Dates



UCPath takes a proactive approach to terminating job records with End Dates:

- End Job Automatically
 - Staff jobs are defaulted to “End Job Automatically” by Employee Class: Contract, Limited, Student, Floater, Rehired Retiree, Per Diem
 - Academic job record templates include an “End Job Automatically” checkbox which can optionally be selected on Hire and Transfer templates or updated in PayPath
- UCPath Center will run a process before each Payroll to automatically terminate staff job records when End Date is reached, and academic job records when End Date is reached and End Job Automatically checkbox is checked
- UCB will be expected to proactively monitor job records with End Dates, and take appropriate action to extend appointment if not terminating, or in case of Academics where checkbox is not checked, to take positive action to terminate or extend appointment

Job Record End Date Monitoring



NEW

UCPath provides several reports for monitoring End Dates:


Reporting Tools	
Jobs with Approaching End Dates Report	Identifies job records with End Dates 30/60 calendar days out from date report is run.
Job Record End Date Audit Report	Identifies job records with Employee Classes (staff) and Job Codes (academic) that should have End Dates, but do not. UCPath Center will work with UCB to ensure job records requiring end dates have them correctly entered into UCPath.
Escalation of Approaching Job Record End Date Report	Identifies job records with End Dates 10 calendar days out from date report is run, to facilitate UCB taking action on any remaining records before auto-termination process runs. UCPath Center plans to distribute this report to UCB-identified central HR/APO offices.

Summary of Future State Changes

- Data entry into templates, approval workflow routing, and submission to UCPath Center for final processing and creation of live transaction
- PayPath custom component that bypasses UCPath Center processing
- Mass Upload capability (e.g., Mass Hires, Mass PayPath Updates)
- Automatic termination of jobs records with End Dates
- “View Only” access to Job and Person Data
- New sequential Employee ID numbers – all in same numbering system
- No distribution lines in Job Data – funding is tied to Position and entered in Commitment Accounting – Job Earnings Distribution (JED) is only used for certain Earnings Codes (e.g., ERIT)
- Additional Pay is no longer entered as distribution lines – will be entered as Recurring Additional Pay attached to job record
- Elimination of time-consuming re-work practices, such as re-entering transactions one day at a time and waiting for data to pass overnight to PPS

Create Template

[Favorites](#) > [Main Menu](#) > [Workforce Administration](#) > [Smart HR Template](#) > [Smart HR Transactions](#)



All

Search

>>

Advanced Search

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type

All

Select Template

UC_FULL_HIRE

UC Full Hire - Staff Only

Create Transaction

Transaction Type

All

Refresh

Transactions in Progress ?

You do not have any transactions in progress.

Go To

Transaction Status

Enter Transaction Details

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE®

All ▾ Search >> Advanced Search

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template UC Full Hire - Staff Only

Organizational Relationship Employee

*Employee ID 🔍

*Job Effective Date 📅

Action Hire

*Reason Code ▾

*Address Format

- Hire - No Prior UC Affiliation
- Rehire - Break in Service
- Transfer-Inter BU, Demotion
- Transfer-Inter BU, Lateral
- Transfer-Inter BU, Promotion
- Transfer-Inter BU, Undefined
- With Prior UC Affiliation

Hire Template - Personal Data

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE® All ▾ Search [] >> Advanced Search

Smart HR Transactions

Enter Transaction Information

Personal Data | Job Data | Earns Dist/Addl Pay

Employee Information

Primary Name - English

*First Name [] Middle Name []

*Last Name [] Name Suffix [▾]

Birthday Information

Date of Birth [] [📅]

Diversity - United States Personalize | Find | View All | [📄] [📅] First 1 of 1 Last

Ethnic Group [] [🔍] [➕] [➖]

Personal Data - United States

Military Status [▾]

Person Education Level

Highest Education Level [A] [🔍]

Person Gender

*Gender [Unknown ▾]

Person National ID United States

National ID Type [PR] [🔍] National ID []

Person Alternate Employee ID

UC Location Match ID []

Hire Template - Personal Data (cont.)

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE® All ▾ Search >> Advanced Search

Person Address 01 - United States

*Address Type Address Line 1

Address Line 2 City

State *Postal Code

County

UC Oath Date

Oath Signature Date

Person Phone Number Personalize | Find | View All | First 1 of 1 Last

Phone Type	Telephone	Preferred
1 <input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Person Email Address Personalize | Find | View All | First 1 of 1 Last

Email Type	Email Address
1 <input type="text"/>	<input type="text"/>

UC Patent Acknowledgment

Patent Acknowledgment Sign Dt ☐ Modified Patent Ackmnt Sign Dt

Comments

Comments

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Hire Template - Job Data

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE®

All ▾ Search [] >> Advanced Search

Smart HR Transactions

Enter Transaction Information

Personal Data | **Job Data** | Earns Dist/Addl Pay

Employee Information

Work Location - Position Data

*Position Number [] 🔍

Work Location - Job Fields

Business Unit [] Department []

Location Code [] Establishment ID [] 🔍

Job Information - Job Code

Job Code []

Job Information - United States

FLSA Status [] ▾

Job Labor - Union Code

Union Code [] Union Seniority Date [] 📅

Job Information - Reporting Information

Reports To Position Number []

Job Information - Employee Classification

*Employee Classification [] 🔍

Classified/Unclassified Ind [Not Applicable] ▾

Job Information - Standard Hours

Standard Hours [] FTE []

Hire Template - Job Data (cont.)

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE® All ▾ Search >> Advanced Search

UC Job Data

Probation Code ▾ Probation End Date

Trial Employment End Date ERIT/Phased Retirement End Dt

Location Use End Date Location Use Type ▾

Alternate Work Week 7/40 ▾ PY Career Duration ▾

UC Employee Review

Review Type ▾ Next Review Date

Job - Salary Plan

Salary Administration Plan Salary Grade

Step

Job Compensation - Pay Components Personalize | Find | View All | First 1 of 1 Last

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Work Location - Expected Job End Date

Expected Job End Date

Job Compensation - Payroll Currency and Frequency

*Compensation Frequency

[Return to Enter Transaction Details Page](#)

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Hire Template - Earnings Distribution/Additional Pay

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE® All ▾ Search >> Advanced Search

Smart HR Transactions

Enter Transaction Information

Personal Data | Job Data | **Earns Dist/Addl Pay**

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: Aggregate Comp Rate:

Job Earnings Distribution Personalize | Find | View All | First 1 of 1 Last

	Earnings Code	Compensation Rate	Percent of Distribution	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Additional Pay Personalize | Find | View All | First 1 of 1 Last

	Effective Date	Earnings Code	Reason for Additional Pay	Earnings End Date	Add'l Pay Amount	Hour
1	<input type="text"/>	<input type="text"/>	<input type="text" value="Not Specified"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID: NEW

Initiator Comments:

Personal Data Template

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE®

All ▾ Search [] >> Advanced Search

Smart HR Transactions

Enter Transaction Information

[Return to Enter Transaction Details Page](#)

Save and Submit Save for Later Cancel

Personal Data

Primary Name - English

*First Name	XXXXXXXXXXXXXXXXXX	Middle Name	XXXXXXXXXXXXXXXXXX
*Last Name	XXXXXXXXXXXXXXXXXX	Name Suffix	▾

Birthday Information

Date of Birth	XXXXXXXXXXXXXXXXXX
---------------	--------------------

Person Gender

*Gender	Male ▾
---------	--------

UC Location Match ID

UC Location Match ID	[]
----------------------	-----

Person National ID United States

*National ID Type	PR [] 🔍	National ID	XXXXXXXXXXXXXXXXXX
<input checked="" type="checkbox"/> Primary ID			

Personal Data Template (cont.)

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Smart HR Template ▾ > Smart HR Transactions

ORACLE® All ▾ Search >> Advanced Search

Person Address 01 - United States

*Address Type: Home ▾ Address Line 1: XXXXXXXXXXXXXXXXXXXX
Address Line 2: City: SAN LUIS OBISPO
State: CA Postal Code: 93401

Person Phone Number Personalize | Find | View All | First 1 of 1 Last

Phone Type	Telephone	Preferred
1 ▾		<input checked="" type="checkbox"/>

Person Email Address Personalize | Find | View All | First 1 of 1 Last

Email Type	Email Address	Preferred
1 ▾		<input checked="" type="checkbox"/>

Person Education Level

*Highest Education Level: K

Comments

Comments:

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW

Initiator Comments:

PayPath – Position Data

Position Data

Job Data

Additional Pay Data

XXXXXXXXXXXXXXXXXXXX

Employee

XXXXXXXXXXXXXXXXXXXX

Empl Record 0

[Position Data](#)

Position Data

Position Number: 40027896

CLIN RSCH CRD SR EX

Action: POS

Position Change

Effective Date: 11/21/2017

Position Change Reason:

New Values to update

Existing Values

Business Unit: IRCMP

UC Irvine Campus

Department ID: IR7452

Emergency Medicine

Location: CONVERSION

Conversion Default

Job Code: 007888

CLIN RSCH CRD SR EX

Union Code: RX

Research Support Professionals

FLSA Status: Exempt

Reports To Position:

Sal Admin Plan: UCRX

Salary Grade: 100

Standard Hours: 40.00

FTE: 1.000000

Current Effective Date: 11/15/2017

Business Unit: IRCMP

UC Irvine Campus

Department: IR7452

Emergency Medicine

Location: CONVERSION

Conversion Default

Job Code: 007888

CLIN RSCH CRD SR EX

Union Code: RX

Research Support Professionals

FLSA Status: Exempt

Reports To Position:

Sal Admin Plan: UCRX

Salary Grade: 100

Standard Hours: 40.00

FTE: 1.000000

Mail Drop:

Adds to FTE Actual Count: ☒

Position Pool:

Include FTE: ☒

Employee Relations Code: All Others, Not Confidential

Representation Code: Covered

Classified Indicator: Professional & Support Staff

Return to Search

Position Data | Job Data | Additional Pay Data

PayPath – Job Data

Job Data Find | View All First 1 of 1 Last

Effective Date: 🔍 Action: 🔍

Effective Sequence: Action Reason: 🔍

Current Effective Date: 11/15/2017 Current Action: DTA Data Change
Current Eff Sequence: 1 Current Action Reason: HIS SYS Update -PayPath Correction

Position Number: 40027896 CLIN RSCH CRD SR EX
Business Unit: IRCMP UC Irvine Campus
Department: IR7452 Emergency Medicine
Location Code: CONVERSION Conversion Default
Job Code: 007888 CLIN RSCH CRD SR EX
Union Code: RX Research Support Professionals

Reports To Position Number:

FLSA Status: Exempt

Salary Administration Plan: UCRX Establishment ID: 🔍 UC Irvine
Salary Grade: 100 Step: 🔍
FTE: 1.000000 Employee Class: 🔍 Staff: Career
Appointment End Date: 🔍

Earnings Distribution Type: None Comp Rate: 5,681.000000 Standard Hours: 40.00 Pay Frequency: 🔍 Monthly

Pay Components Personalize | Find | 📄 | 📅 First 1 of 1 Last

Rate Code	Comp Rate	Compensation Frequency
1 UCANNL	68,172.000000	Annual 🔍

Earnings Distribution Personalize | Find | 📄 | 📅 First 1 of 1 Last

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt: 🔍 Trial Employment End Date: 🔍

Probation Code: ▼ PY Career Duration: ▼

Location Use End Date: 🔍 Probation End Date: 🔍

Location Use Type: ▼

Job Data Comments:

PayPath – Additional Pay Data

Position Data | Job Data | **Additional Pay Data**

XXXXXXXXXXXXXXXXXXXX Employee Empl ID XXXXXXXXXXXXXXXXXXXX

New Additional Pay Find | View All First 1 of 1 Last

*Earnings Code:

Effective Date Find | View All First 1 of 1 Last

*Effective Date:

Payment Details Find | View All First 1 of 1 Last

Addl Seq #:

End Date: Reason:

Pay Period Amt:

Goal Amount: Goal Balance:

☒ Prorate Additional Pay

Applies To Pay Periods

☒ First ☐ Second ☐ Third

Job Information

Employee Type:	Salaried	Standard Hours:	40.00
Compensation Rate:	\$5,681.000000	Frequency:	Monthly

Default Job Data

Position:	40027896	CLIN RSCH CRD SR EX
Business Unit:	IRCMP	UC Irvine Campus
Department:	IR7452	
Job Code:	007888	CLIN RSCH CRD SR EX
FTE:	1.000000	
Employee Status:	Active	Expected Job End Date:

[Upload | View Supporting](#)



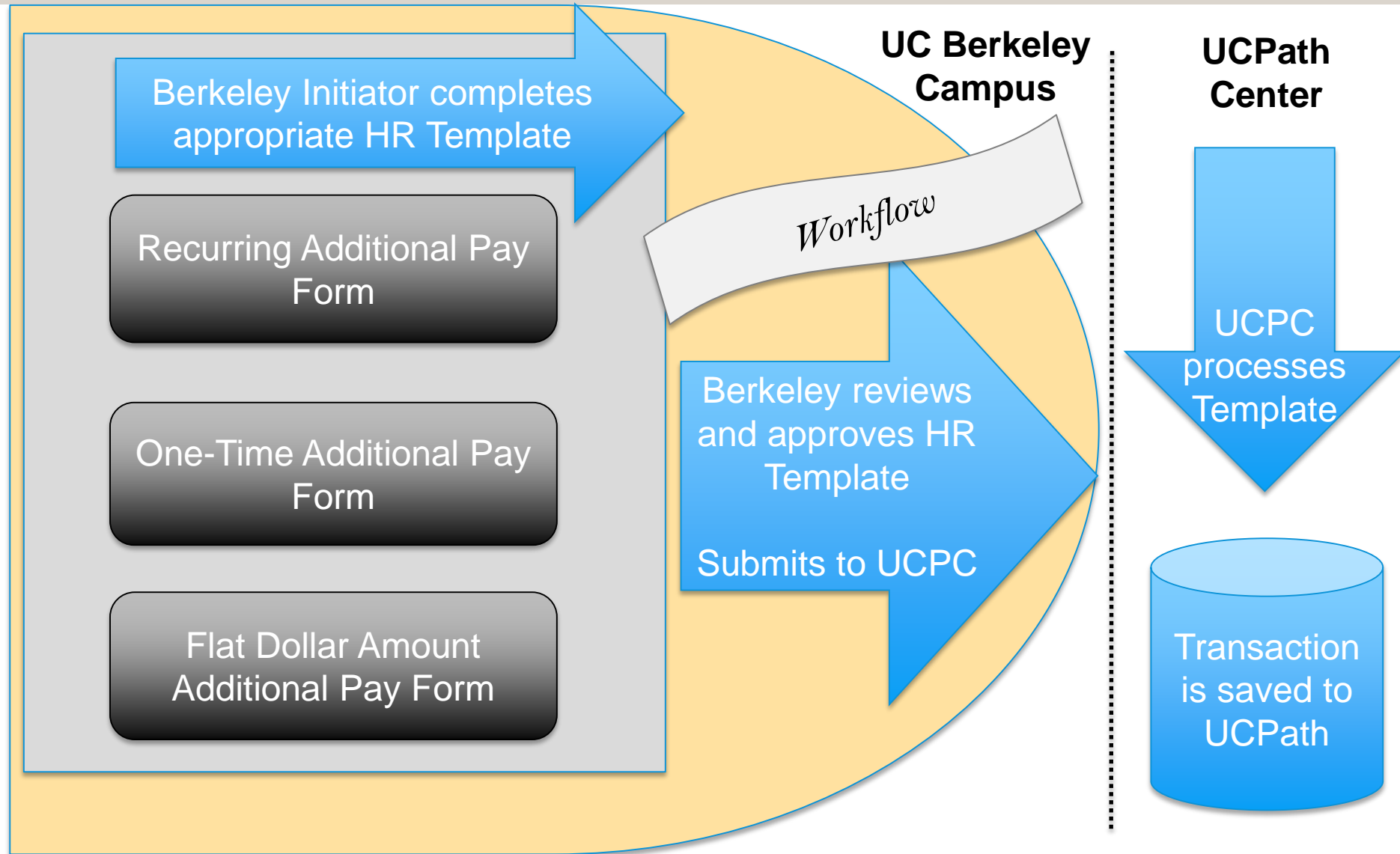
Payroll Processes

CRP Overview

Payroll Overview

- Payroll is the process of paying employees the total wages or salaries that they earn, including their regular pay, as well as additional pay components (e.g., stipends, awards) and deductions (e.g., parking fees, union dues).
- The main topics covered in the CRPs included:
 - General Deductions
 - Final Pay
 - Additional Pay
 - Mass Pay

Sample Workflow: Additional Pay



Changing Roles and Responsibilities

- System and business process changes related to Workforce Administration and Pay-related functions may result in changes to current roles and responsibilities.
- Some functions in UCPath will be available in both Workforce Administration and Pay-related components.
- Functions that are currently located in HCM Workforce Administration and PPS (e.g., funding/chartstring changes) will now be housed in the Commitment Accounting components of UCPath.
- Future-state will require clear definition of roles and responsibilities with respect to transaction type.
- All processes will be standardized and consistent across all teams; no duplicate work will be done.

PPS vs. UCPATH – A Change in Entry Thinking (1/2)

- In current state, **PPS** utilizes Pay Period End Date. For retroactive adjustments, **UCPath** will utilize the Check Date.
 - **Example:** The pay period ends in September and the check is issued on October 11. This is the date to use to determine which pay period to adjust.

September							October						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31				

Pay Period
End Date

Check Date

- This represents a change in thinking and how we enter adjustments in the system.

PPS vs. UCPATH – A Change in Entry Thinking (2/2)

- For future or current pay period adjustments, the effective date for the transaction is the Pay Period Begin Date.
 - **Example:** The Pay Period Begin Date is September 17 and the Check Date is October 11. If you want it to affect the October 11 check, the effective date should be September 17.

September							October						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
					1	2	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31				

Pay Period
Begin Date

Check Date

Additional Comp – Multiple Ways to Enter Pay

- While there are often multiple ways of submitting the same information, the forms function differently in the system.
- The criteria of the adjustment (future vs retro, one time vs. recurring, exempt vs. non-exempt, etc.) will derive which form/entry method to use.
 - **Recurring Additional Pay form** – allows for flat dollar amount or %, allows for proration for retroactive adjustments; useful for stipends, retro pay (esp. for non-exempt/overtime)
 - **One-Time Additional Pay form** – allows for flat dollar amount or %, mass upload available; useful for mass transactions with additional pay based on %
 - **Flat Dollar Amount Additional Pay form** – allows for one-time payments, mass upload available, allows future dating; useful for future-dated mass actions or actions for terminated employees
- Using the wrong form could lead to errors resulting in the employee being underpaid or overpaid.
- We will need clear processes in place for each transaction type in order to avoid inconsistencies and errors.

Summary of Future State Changes

- System and business process changes related to Workforce Administration and Pay-related functions may result in changes to current roles and responsibilities.
- Some chartstring/funding work, like Payroll Expense Transfers (now called Direct Retro), will now be housed in the Commitment Accounting components of UCPath.
- When entering payroll adjustments, effective dates for UCPath should be entered with respect to the Check Date.
- Due to multiple similar entry methods, clear processes will be developed to detail what forms to use under which conditions.

General Deductions

General Deduction Update

Wing, Deborah Ann

Company UCS University of California
Business Unit IRCMP UC Irvine Campus
Department IR7457 Obstetrics and Gynecology
Employee Type Salaried
FTE
Employee Status Active

Person ID 59984128
Pay Group 9HS Pay Frequency M
Position
Job Code 001721 PROF-HCOMP
Standard Hours 40.00
Expected Job End Date

New General Deductions

Find | View All First 1 of 1 Last

*Deduction Code

+ -

Deduction Details

Find | View All First 1 of 1 Last

Effective Date

*Calculation Routine

Deduction End Date

Deduction Rate or %

Flat/Addl Monthly Amount

Flat/Addl Pay Period Amount

Goal Amount

Current Goal Balance

This data was last updated by

Data last updated on

Current General Deductions

Find | View All First 1 of 1 Last

Deduction Code

Deduction Details

Find | View All First 1 of 1 Last

Effective Date 11/17/2017

Calculation Routine

Deduction End Date

Deduction Rate or %

Flat/Addl Monthly Amount

Flat/Addl Pay Period Amount

Goal Amount

Current Goal Balance

This data was last updated by


Data last updated on

Save Return to Search Previous in List Next in List

Update/Display Include History Correct History

Additional Compensation – Options Page

[Favorites ▾](#) [Main Menu ▾](#) [> UC Customizations ▾](#) [> UC Extensions ▾](#) [> Self Service Transaction Links](#)



All ▾

Search

>>

Advanced Search

Self Service Transaction Links

One-Time Payments

Submit one-time payments for approval

Approve One Time Pay

Approve One Time Payment Request

Upload One-Time Payment File

Submit one-time payment file for approval

Approve One Time File

Approve One Time File Upload Request

Payroll Request

Submit Final Pay or Off-Cycle Payment For Approval

Approve Payroll Requests

Approve Payroll Requests

Manage Accruals

Submit Payouts, Accruals, Adjustments, Takes and Hours adjustments for approval

Upload E-084 File

Upload I-181 format file into Manage Accruals to create transactions and initiate AWE

Additional Pay

Grant an employee additional pay

Approve Additional Pay

Approve Additional Pay Request

Searching For an Employee

Default Employee Details shown are:

Name, Business Unit, EID, Job (Record Number), Employee status, Active, Reason, Effective Date, Position Number, Department, Job Code, Job Code Description, Employee Class, Future Dated *Y/N), Work Force Job Summary (link)

These columns can be sorted or switched out for other fields by clicking “Personalize.”

One-Time Payments

Employee Selection Criteria

Empl ID

59984128

Empl Rcd

Last Name

First Name

Business Unit

Department

Job Code

[Get Employees](#) [Return](#)

Employee Details Personalize Find View All														
First 1-2 of 2 Last														
Name	Business Unit	Employee ID	Job	Empl Status	Action	Reason	Effective Date	Position Number	Department	Job Code	Job Code Descr	Employee Class	Future Dated (Y/N)	Workforce Job Summary
Wing, Deborah Ann	IRCMP	59984128	0	Active	DTA	DIS	08/01/2017		IR7457	001721	PROF-HCOMP	Academic: Faculty	<input checked="" type="checkbox"/>	Workforce Job Summary
Wing, Deborah Ann	IRCMP	59984128	1	Active	DTA	DIS	08/01/2017		IR7457	001726	PROF IN RES-HCOMP	Academic: Faculty	<input checked="" type="checkbox"/>	Workforce Job Summary

Additional Compensation - One-Time Payments

One-Time Payments

Transaction ID: NEW

Name: Deborah Wing

Employee ID: 59984128 Empl Record: 0

☐ Do you want to override the ChartField values?

New One Time Payments Find | View All First 1 of 1 Last

*Earnings Code:

☐ Gross-Up

Earnings Amount:

*Pay End Date: 09/30/2017

*Earnings Begin:

*Earnings End:

Current One-Time Payments Find | View All First 1 of 1 Last

Earnings Code: AWD Incentive Award ☐ Gross-Up

Approval Status: **Approved** Transaction ID: O000000007

Earnings Amount: 100.00 Pay End Date: 12/31/2017

Earnings Begin: 11/01/2017 Earnings End: 12/31/2017

ChartField Detail

KFS Chart Code:

Object Code:

KFS Account:

Fund:

Project ID:

Sub:

KFS Sub Account:

Initiator Comment:

Submit

Return

Additional Compensation – Additional Pay

New Additional Pay Find | View All First 1 of 1 Last

***Earnings Code**

Effective Date Find | View All First 1 of 1 Last

***Effective Date**

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date

Reason

Pay Period Amt

Goal Amount

Goal Balance

☒ Prorate Additional Pay

Applies To Pay Periods

☒ First ☐ Second ☐ Third

Job Information

Employee Type	Salaried	Standard Hours	20.00
Compensation Rate	\$10020.833334	Frequency Type	Evry 4 Wks

Default Job Data

Position:	40023418	
Business Unit	IRCMP	
Department	IR7457	Obstetrics and Gynecology
Job Code	001721	PROF-HCOMP
FTE	0.500000	Expected Job End Date
Employee Status	Active	



General Ledger Processes

CRP Overview

Agenda

- Funding Entry Process Overview
- Usage of Funding Templates
- Direct Retro Template
- Summary of Future State Changes

Funding Entry Process Overview

- Funding Entry is the process of entering chartstring data to indicate the source of funding for earnings, employer-share deductions and taxes, and occurs in Commitment Accounting component
- Funding is associated with the position
- Allocation of fund source may occur at a position, position pool or department level
- Ways to enter funding data:
 - Funding Entry template
 - Salary Cap/Multiple Component of Pay (MCOP) Worksheet template
 - Funding Upload template
- Using Funding Entry or Salary Cap/MCOP worksheet template triggers an Approval Workflow process; the approver(s) in the Approval Workflow process receive an auto-generated email notification and the item appears in their Worklist inbox

Usage of Funding Templates

Funding Entry Template:

- Used to create or update funding at a position, position pool, or department level
- Can be used for vacant/filled positions and most fund sources

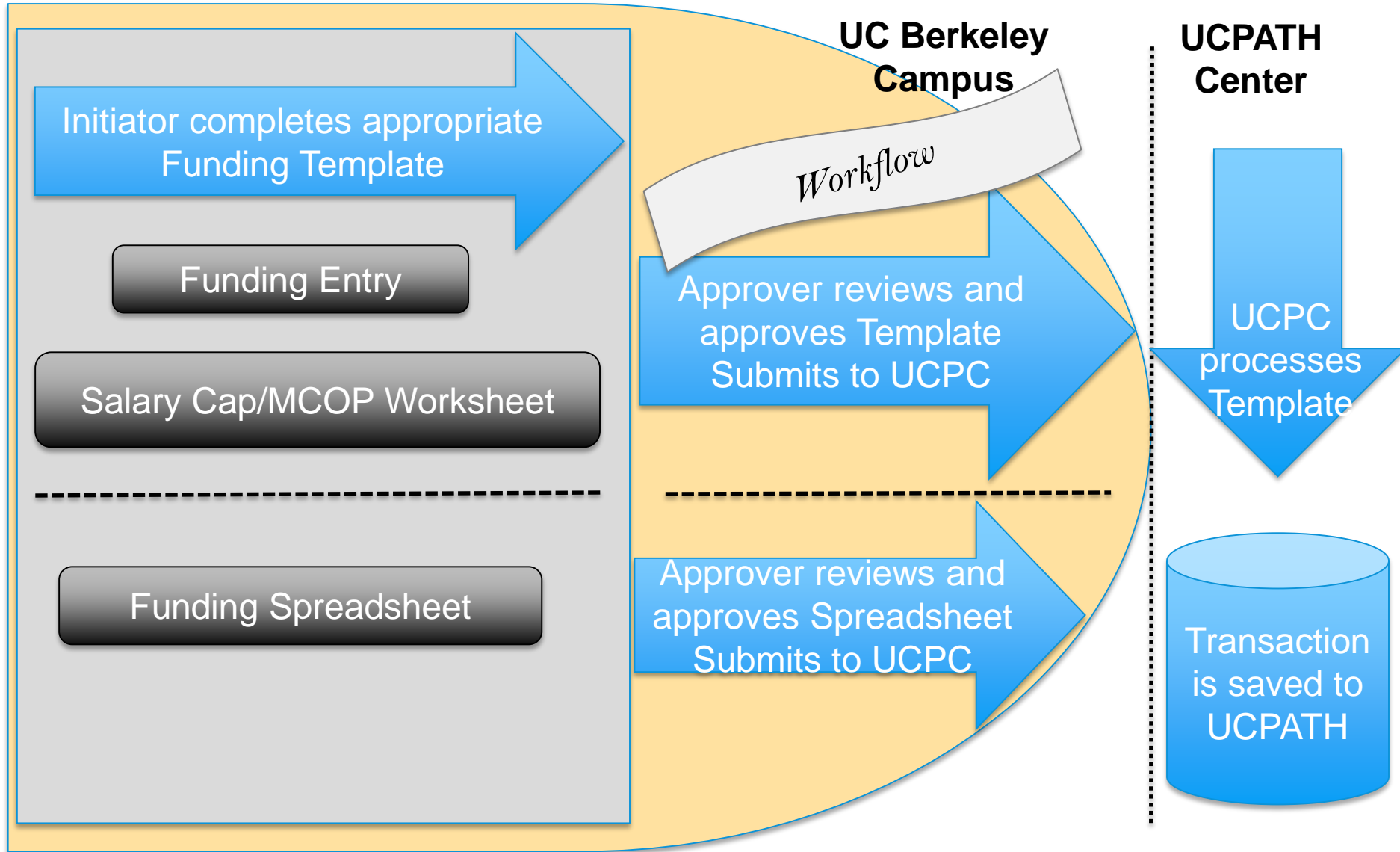
Salary Cap/MCOP Worksheet template:

- Used to create or update funding at a position level for an employee that has multiple components of pay and/or has a funding source that is subject to a salary cap
- Used for a filled position with one incumbent

Funding Upload template:

- Used to create or update mass funding entry transactions

Funding Entry Process Flow



Direct Retro Process

- Replaces Payroll Expense Transfers/Salary Cost Transfers in Payroll component
- Multiple changes during the day are not allowed once the transaction has been submitted and approved; must cycle through nightly batch processing before changes are permitted
- Has the option to use the Salary Cap/MCOP worksheet template for funding changes for an employee that had multiple components of pay and/or had funding source that was subject to a salary cap
- Updates made and saved trigger an Approval Workflow process; auto-generation of an email is sent to the approver(s) in the Approval Workflow process

Summary of Future State Changes

- Funding is associated with the position; funding entry is done in Commitment Accounting component
- Funding Entry template used for funding at position, position pool, or department level
- Salary Cap/MCOP Worksheet template used for funding changes at a position level for an employee with multiple components of pay and/or has funding source that is subject to a salary cap
- Funding Entry and Direct Retro changes entered online trigger an Approval Workflow process
- New Approval Worklist process for approvers
- Direct Retro template replaces Payroll Expense Transfer (PET) | Salary Cost Transfer Changes (SCT) in Payroll component

Appendix A – Screenshot Funding Entry

avorites Main Menu > Set Up HRMS > Product Related > Commitment Accounting > UC Customizations > Funding Entry

Funding Entry

Request ID NEW

Set ID: LACMP Department: 007000 EDUC Request Status In Progress

Fiscal Year: 2014 Budget Begin Date: 07/01/2013 Budget End Date: 06/30/2014

Level

☐ Department ☐ Position Pool ☒ Position

Position Number: 10000053 SUPERVISOR OF PHYS ED- ACAD YR Pool ID:

Job Data Snapshot

Empl ID	Name	Empl Rcd	Effective Date	Eff Seq	Department	Job Code	Job Code Descr	Payroll Status	Action	Reason Code
1 11011333	Smith, Jimmy		0 07/17/2013	0	007000	002100	SUPERVISOR OF PHYS ED-ACAD YR	Active	Data Change	Benefits: Update Eligibility

*Funding Effective Date: Eff Seq: 0 *Status: Active Record Status In Progress

Earnings Distribution

Ern Cd	Seq #	Combo Code	Location	Account/CC	FS Department	*Fund	Project	*Sub	GL Bus Unit	Funding End Date	Pay Dist %	Exclusion Fringe Group
1			4						LAFIN			

Requester Comment

[Budget Distribution Details](#)

[Salary Cap/MCOP Funding Worksheet](#)

Screenshot Direct Retro (1 of 2)

Oracle

Payroll for North America > Payroll Distribution > UC Customizations > Process Direct Retro > Review Retro Distribution

Retro Distribute Earnings | Retro Distribute Deductions | Retro Distribute Taxes | Earnings Messages | Deduction Messages | Tax Messages

Retro Distribution Transaction

Run Cntl: DR00000001100 Created By: 10000648 Valdeabella, Jennifer Conlu Created: 10/27/2017

Trans Type: Direct Date of Pay: 11/04/2017

Processing Status: Initiated Request Status: In Progress

Cancel

Check Earnings Find | View All First 1 of 1 Last

Empl ID: 10050134 Main 001,CRP DR Empl Record: 0

Company: UCS Pay Group: 4ME Pay Begin Date: 06/01/2017 Pay End Date: 06/30/2017

Pay Run ID: 170630M0X ☐ Off Cycle

Old Data Personalize | Find | First 1-3 of 3 Last

Earning details | Job details | Old Accounting Period

Empl Rcd#	Earnings Code	Sub/Objct	Combination Code	Location	Account/CC	FS Dept	Fund	Project	Sub Override	GL Bus Unit	OTC Indicator	Earnings
1	0 REG	011100	000165266	4	4411042Y	1430	69749	ADMIN	02	LAFIN		\$2,237.97
2	0 REG	011100	000167943	4	4411042Y	1430	05399	ADMIN	02	LAFIN		\$3,051.90
3	0 REG	011100	000168080	4	4011042X	1430	19900	ADMIN		LAFIN		\$5,391.55

New Data Personalize | Find | First 1-3 of 3 Last

Earning details | Job Details | Posting Accounting Period

Empl Rcd#	Earnings Code	New Sub/Objct	New Combo Code	Location	Account/CC	FS Dept	Fund	Project	Sub Override	GL Bus Unit	OTC Indicator	New Earnings Amount	Apply/Remove Work Study
1	0 REG	011100	000165266	4	4411042Y	1430	69749	ADMIN	02	LAFIN		\$2,237.97	+
2	0 REG	011100	000167943	4	4411042Y	1430	05399	ADMIN	02	LAFIN		\$3,051.90	+
3	0 REG	011100	000168080	4	4011042X	1430	19900	ADMIN		LAFIN		\$5,391.55	+

Check Balance Total: \$10,681.42 Balance: \$0.00 Direct Retro Salary Cap/MCOP Funding Worksheet

Screenshot Direct Retro (2 of 2)

New DataPersonalize | Find | | First 1-3 of 3 Last

Earning details | Job Details | Posting Accounting Period

Empl Rcd#	Earnings Code	New Sub/Object	New Combo Code	Location	Account/CC	FS Dept	Fund	Project	Sub Override	GL Bus Unit	OTC Indicator	New Earnings Amount	Apply/Remove Work Study
1	0 REG	011100	000165266	4	4411042Y	1430	69749	ADMIN	02	LAFIN		\$2,237.97	
2	0 REG	011100	000167943	4	4411042Y	1430	05399	ADMIN	02	LAFIN		\$3,051.90	
3	0 REG	011100	000168080	4	4011042X	1430	19900	ADMIN		LAFIN		\$5,391.55	

Check Balance

Total: \$10,681.42
Balance: \$0.00

Direct Retro Salary Cap/MCOP Funding Worksheet

Initiator Comment:

254 characters remaining
To limit the number of salary cost transfers in the future, please refer to local Cost Transfer Policy and Procedures.

Questionnaire

Expand/Collapse All

Justification
Document Upload

Add Attachment

View Attachment

Delete Attachment

Approver document upload

*Reason Code

Align Salary to Effort

Data Entry Error

Late Award or Chartfield Setup

Other (Specify in Comments)

Submit

Save

Return to Search

Notify

Sample Cross-Functional Scenario

Position
Data

Position
Funding

Hire
Employee

Job
Reclass

Stipend

Redirect
Payroll
Expense

Initiate and
approve
new
Position

Initiate and
approve
Position
Funding

Initiate,
approve
and submit
template to
UCPath
Center

Initiate and
approve
update to
Position
and Job

Initiate and
approve
additional
pay

Initiate and
approve
direct retro

Position
Control
Form

Funding
Entry
Template

New Hire
Template

PayPath

Recurring
Additional
Pay

Direct
Retro
Template

Next Steps

What do we need from you?

Your time to meet with us – approximately 2-4 hours per week over next 6-8 weeks, working with your schedule



What will we be doing first?

Documenting current state processes and work handoffs

Identifying alignment gaps

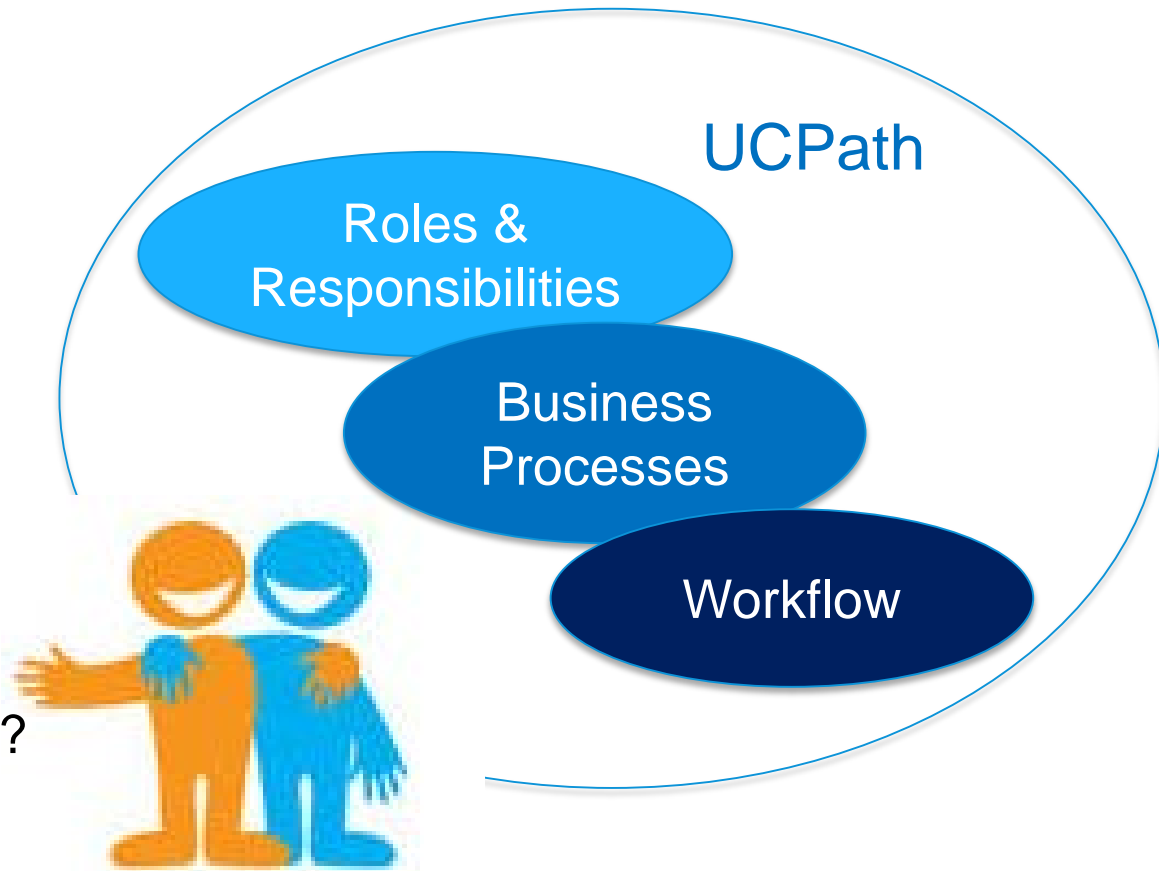
Designing future state

What comes after that?

Validation of configuration and conversion data

What can you expect from us?

Collaboration and Partnership





Questions?



Thank You!