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

- 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

New Positions

Updates to Vacant Positions

UCB Initiator enters data into custom form

Position Control Form

UCB reviews and approves request

Position Approval Page

Workflow

UCB Berkeley

UCPath Center

Position is created or updated in UCPath

Note: Updates to filled positions are performed using custom ‘PayPath’ component
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 2\textsuperscript{nd} 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 the same series – repurposing requires deactivating and creating a new position.

- A position may be moved from one Department to another if the role is being transferred – otherwise, it is required to inactivate the position and create a 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 the 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 the 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

Transaction Type

- Add New Position
- Update Vacant Position
- Review Transaction

Draft Transactions

Delete Selected Transactions
Description Tab

![UCPATH Description Tab Image]
Specific Information Tab

- **Position Number**: NEW
- **Headcount Status**: NEW
- **Transaction ID**: 1111111111
- **Current Head Count**: 0
- **Out of**: 0

**Specific Information**

- **Effective Date**: 10/16/2017
- **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**: 

**Berkeley UCPath**
# UC Position Data Tab

![UC Position Data Tab Image]

### Position Number
- **Headcount Status**: NEW
- **Current Head Count**: 0 out of 0

### Employee Relations Code
- **Effective Date**: 10/16/2017
- **Status**: Active

### Special Training Code
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### Security Clearance
<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### Representation Code

### Save for Later | Cancel
### Supporting Documents Tab

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Position Number</th>
<th>Effective Date</th>
<th>Action Reason</th>
<th>Operator ID</th>
<th>Unique Sys Filename</th>
<th>DateTime Stamp</th>
<th>Attached File</th>
<th>Add Attachment</th>
<th>View Attachment</th>
<th>Delete Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 NEW</td>
<td></td>
<td></td>
<td>NEVY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Add Attachment</td>
<td>View Attachment</td>
<td>Delete Attachment</td>
</tr>
</tbody>
</table>

**Buttons:**
- Save and Submit
- Save for Later
- Cancel
A Position Control transaction has been routed to you for its next level of approval for:

- Position No: NEW
- Dept ID: IR8830
- Title: CHAN
- Transaction ID: 100000038

Would you please approve it (if appropriate) at your earliest convenience?

Thank you.

You may process this transaction at:
http://slc05sgd.us.oracle.com:8000/psp/hr-920msbx/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_POS_REQ_APPR_GBL?
Page=UC_POS_REQ_APPR&Action=U&TRANSACTIONID=100000038&POSITION_NBR=NEW&ACTION_DATE=2017-10-16

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.
Workforce Administration
CRP Overview
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

- 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
UCB Initiator completes appropriate HR Template

- Hire
- Rehire
- Personal Data
- Transfer
- Add Concurrent Job
- Termination
- Add / Renew CWR
- TAM
- Prepare for Hire

Inter-location Transfers

- Receiving Location
- Hire
- Releasing Location
- Termination

UC Berkeley

Workflow

UCB reviews and approves HR Template

Submits to UCPath Center

Transaction is saved to UCPath

UCPPath Center

UC Berkeley UCPath Center processes Template
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

- 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 UCPPath or places on server for pickup and upload in nightly batch

- Upon UCB approval, PayPath updates are processed directly into UCPPath as live transactions – no involvement of UCPPath 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*
Filled Position, Job and Additional Pay Updates

UCB Initiator enters data into PayPath

UCB approves update

PayPath Approval Page

Position / Job / Additional Pay update is made in UCPath

Note: Updates to vacant positions are performed using Position Control Form (self-service) or Position Data
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

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**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

UCB will have VIEW ONLY access
Mass Hire Batch Upload Process

- 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:

<table>
<thead>
<tr>
<th>Class</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>Partial-Year Career Furlough</td>
</tr>
<tr>
<td></td>
<td>Floater</td>
</tr>
<tr>
<td></td>
<td>Limited</td>
</tr>
<tr>
<td></td>
<td>Undergraduate Students</td>
</tr>
<tr>
<td>Academic</td>
<td>Academic Students</td>
</tr>
<tr>
<td></td>
<td>Unit 18- Benefits Bridge Eligible</td>
</tr>
<tr>
<td></td>
<td>Unit 18- Benefits Bridge Not Eligible</td>
</tr>
<tr>
<td></td>
<td>University Extension (UNEX)</td>
</tr>
<tr>
<td></td>
<td>Variable Appointment</td>
</tr>
<tr>
<td></td>
<td>Research Funding Bridge</td>
</tr>
</tbody>
</table>

- 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**
UCPath provides several reports for monitoring End Dates:

<table>
<thead>
<tr>
<th>Reporting Tools</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs with Approaching End Dates Report</td>
<td>Identifies job records with End Dates 30/60 calendar days out from date report is run.</td>
</tr>
<tr>
<td>Job Record End Date Audit Report</td>
<td>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.</td>
</tr>
<tr>
<td>Escalation of Approaching Job Record End Date Report</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

Smart HR Transactions
Select a template and press Create Transaction.

Transaction Template
Transaction Type: All
Select Template: UC_FULL_HIRE

Transactions in Progress
You do not have any transactions in progress.

Go To Transaction Status
Enter Transaction Details

The following transaction details are required.

**Template**: UC Full Hire - Staff Only

**Organizational Relationship**: Employee

- **Employee ID**: NEW
- **Job Effective Date**: 12/01/2017

**Action**: Hire

**Reason Code**
- 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

**Address Format**

**Continue**  **Cancel**
Hire Template - Personal Data
Hire Template - Personal Data (cont.)
Hire Template - Job Data
Personal Data Template

[Image of Oracle interface showing personal data fields]

- **Primary Name - English**
  - *First Name*: XXXXXXXXXXXXXXXXXXXX
  - *Last Name*: XXXXXXXXXXXXXXXXXXXX
  - Middle Name: XXXXXXXXXXXXXXXXXXXX
  - Name Suffix:

- **Birthday Information**
  - Date of Birth: XXXXXXXXXXXXXXXXXXXX

- **Person Gender**
  - *Gender*: Male

- **UC Location Match ID**
  - UC Location Match ID:

- **Person National ID United States**
  - *National ID Type*: PR
  - National ID: XXXXXXXXXXXXXXXXXXXX

[Data fields are filled with placeholder text]
Personal Data Template (cont.)

### Person Address 01 - United States

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Address Line 1</th>
<th>City</th>
<th>Postal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>XXXXXXXXXXXXX</td>
<td>SAN LUIS OBISPO</td>
<td>93401</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td></td>
</tr>
</tbody>
</table>

### Person Phone Number

<table>
<thead>
<tr>
<th>Phone Type</th>
<th>Telephone</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Person Email Address

<table>
<thead>
<tr>
<th>Email Type</th>
<th>Email Address</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Person Education Level

<table>
<thead>
<tr>
<th>*Highest Education Level</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>K</td>
<td></td>
</tr>
</tbody>
</table>

### Comments

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Return to Enter Transaction Details Page

- Save and Submit
- Save for Later
- Cancel

Transaction ID: NEW

Initiator Comments: 
PayPath – Position Data
PayPath – Job Data

![Job Data Screen](Image)

- **Effective Date:** 11/15/2017
- **Effective Sequence:** 0
- **Current Effective Date:** 11/15/2017
- **Current Eff Sequence:** 1
- **Position Number:** 40027896
- **Business Unit:** IRCMP
- **Department:** IR7452
- **Location Code:** CONVERSION
- **Location:** CLIN RSCH CRD SR EX
- **Job Code:** 007888
- **Union Code:** RX
- **Reports To Position Number:**
- **FL SA Status:** Exempt
- **Salary Administration Plan:** UCRX
- **Salary Grade:** 100
- **FTE:** 1.000000
- **Appointment End Date:**
- **Establishment ID:** UCI
  - **UC Irvine**
- **Step:** 3
- **Employee Class:** Staff: Career
- **Earnings Distribution End Date:**
- **Pay Components:**
  - **Rate Code:** UCANNL
    - **Comp Rate:** 68,172.000000
- **Compensation Frequency:**
  - **Pay Frequency:** Monthly
- **UC Job Data:**
  - **ERIT/Phased Retirement End Date:**
  - **Probation Code:** None
  - **Location Use End Date:**
  - **Location Use Type:**
PayPath – Additional Pay Data

New Additional Pay

- Earnings Code: [field]
- Effective Date: 11/21/2017

Payment Details

- Addi Seq #: 1
- End Date: [field]
- Reason: Not Specified
- Pay Period Amt: [field]
- Goal Amount: [field]
- Goal Balance: [field]

Applies To Pay Periods

- First

Job Information

- Employee Type: Salaried
- Compensation Rate: $5,681.000000
- Standard Hours: 40.00
- 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

[Buttons: Save for Later, Save And Submit, Cancel]
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

- Berkeley Initiator completes appropriate HR Template
  - Recurring Additional Pay Form
  - One-Time Additional Pay Form
  - Flat Dollar Amount Additional Pay Form

UC Berkeley Campus

Workflow

UC Path Center

- Berkeley reviews and approves HR Template
- Submits to UCPC

Transaction is saved to UCPath
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.

- This represents a change in thinking and how we enter adjustments in the system.
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.
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
Additional Compensation – Options Page

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.”
Additional Compensation - 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

*Earnings Code: [Input Field]
Earnings Amount: [Input Field]
*Earnings Begin: [Input Field]
*Pay End Date: 09/30/2017

Current One-Time Payments

Earnings Code: AWD - Incentive Award
Approval Status: Approved
Transaction ID: 0000000007
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: [Input Field]
Additional Compensation – Additional Pay

New Additional Pay

- **Earnings Code**: [Field]
- **Effective Date**: 11/28/2017

Payment Details

- **Addl Seq #**: 1
- **End Date**: [Field]
- **Reason**: Not Specified
- **Pay Period Amt**: [Field]
- **Goal Amount**: [Field]
- **Goal Balance**: [Field]
- **Prorate Additional Pay**: [Checkbox]

Applies To Pay Periods

- [ ] First
- [ ] Second
- [ ] Third

Job Information

- **Employee Type**: Salaried
- **Standard Hours**: 20.00
- **Frequency Type**: Evry 4 Wks
- **Compensation Rate**: $10020.833334

Default Job Data

- **Position**: 40023418
- **Business Unit**: IRCMP
- **Department**: IR7457
- **Job Code**: 001721
- **FTE**: 0.500000
- **Expected Job End Date**: [Field]
- **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
Initiator completes appropriate Funding Template

Funding Entry

Salary Cap/MCOP Worksheet

Funding Spreadsheet

Approver reviews and approves Template
Submits to UCPC

Approver reviews and approves Spreadsheet
Submits to UCPC

Transaction is saved to UCPATH

UC Berkeley Campus

UCPC processes Template

UCPATH Center
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
Screenshot Direct Retro (1 of 2)
## Direct Retro Salary Cap/MCOP Funding Worksheet

<table>
<thead>
<tr>
<th>Empl Row#</th>
<th>Earnings Code</th>
<th>New Sub/Obj Code</th>
<th>New Combo Code</th>
<th>Location</th>
<th>Account/CC</th>
<th>FS Dept</th>
<th>Fund</th>
<th>Project</th>
<th>Sub Override</th>
<th>GL Bus Unit</th>
<th>OTC Indicator</th>
<th>New Earnings Amount</th>
<th>Apply/Remove Work Study</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0 REG</td>
<td>011100</td>
<td>000165266</td>
<td>4</td>
<td>4411042Y</td>
<td>1430</td>
<td>69749</td>
<td>ADMIN</td>
<td>02</td>
<td>LAFIN</td>
<td></td>
<td>$2,237.97</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>0 REG</td>
<td>011100</td>
<td>000167943</td>
<td>4</td>
<td>4411042Y</td>
<td>1430</td>
<td>65399</td>
<td>ADMIN</td>
<td>02</td>
<td>LAFIN</td>
<td></td>
<td>$3,051.90</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>0 REG</td>
<td>011100</td>
<td>0001680380</td>
<td>4</td>
<td>4011042X</td>
<td>1430</td>
<td>19900</td>
<td>ADMIN</td>
<td></td>
<td>LAFIN</td>
<td></td>
<td>$5,391.55</td>
<td></td>
</tr>
</tbody>
</table>

**Initiator Comment:**

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)

Save

Return to Search | Notify
Sample Cross-Functional Scenario

- **Position Data**
  - Initiate and approve new Position

- **Position Funding**
  - Initiate and approve Position Funding

- **Hire Employee**
  - Initiate, approve and submit template to UCPath Center

- **Job Reclass**
  - Initiate and approve update to Position and Job

- **Stipend**
  - Initiate and approve additional pay

- **Redirect Payroll Expense**
  - 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!