



# UCPath CRP Overview

TAM, Benefits &  
Leave Management

# 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

TAM

Benefits

Leave Management

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





**TAM**

# Overview : TAM (Talent Acquisition Management)

- Continues to be our staff recruitment system.
- What's **not** changing?:
  - Business Process and steps
  - UCB roles, responsibilities, approvals and workflow
  - Basic page layout for recruiters and applicants\*  
(\*apart from a few changes in fields or labels)

# Changes

- Can add multiple position numbers to a posting to “combine pools”.
- Could import job description information from Job Builder.
- Posting destinations no longer need to be added to the job posting.
- Once Offer is set to “Accepted”, a posting removal date will be automatically added (if posting is still listed).
- Hiring Managers and interview team will have different columns and actions available to them. e.g. Ranking changes from Yes-Maybe-No to Stars ★

# Improvements

- Static URL for the job posting! Can now use/send the URL and applicants can bookmark a job.
  - Separate Cover Letter now allowed per job.
- (\*pending: testing to ensure applicants can use multiple cover letters per day for multiple jobs).
- Applicants can “withdraw” themselves from a job, without having to contact anyone at UCB.

# Work in Progress

- Manage External Postings process (process by which outside posting destinations will be managed.)
- Recording the Interview Information and Evaluation. (Replace the IDF?)
- Prepare Job Offer. Seems to mostly mirror current state, but would allow for an offer to be posted online for an applicant to view and accept.
- Prepare for Hire. Being modified to work better with the Manage Transactions page (aka Manage Hires).



# Conversion

- No historical job recruitment information will be converted by UCPATH.
- Only recruitments active during go-live will be carried over.
- Applicants from the last year will have their information converted, but will have to set up a new password.

# TAM Appendix A: Create Job Opening part 1

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

**Oracle HR System - Create Job Opening**

Navigation: Favorites ▾ | Main Menu ▾ > Recruiting ▾ > Create Job Opening

Home | Worklist | MultiChannel Console | Performance

**Employee Classification**

**Department** D01000 Graduate School of Education

**Status Code** 005 Draft

**Status Reason**

**\* Status Date** 11/07/2017

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**Desired Start Date**

**Encumbrance Date**

**Projected Fill Date**

**Date Authorized**

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**Referral Program ID**

**Recruitment Contact**

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**Locations**

Location	Location Description	Primary Location
P5523	SPROUL	<input checked="" type="checkbox"/>

# Appendix A: Create Job Opening part 2

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

Schedule Type	Variable
Regular/Temporary	Not Applicable
Begin Date	<input type="text"/> 31
End Date	<input type="text"/> 31
Shift	Not Applicable
Hours	0.01
Work Period	Weekly ▼
Travel Percentage	Never or rarely ▼

**Salary Information** ?

Salary Admin Plan	CTRV	Career Tracks - UCR
From Grade	26	Grade 26
From Step	<input type="text"/> 🔍	
To Grade	<input type="text"/> 🔍	
To Step	<input type="text"/> 🔍	
Salary Range From	43.342912	(Default From Job Code)
Salary Range To	85.392720	(Default From Job Code)

# Appendix A: Create Job Opening part 3

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

**Locations** ?

Location	Location Description	Primary Location	
P5523	SPROUL	<input checked="" type="checkbox"/>	

Add Location

**Recruiting Locations** ?

Recruiting Area	Recruitment Area Description	Primary Recruiting Area	Target Openings	
5026	Main Campus - UCR	<input checked="" type="checkbox"/>	1	

Add Recruiting Location

**Positions**

Position	Position Number	Primary Position	
Human Resource Manager	40002258	<input checked="" type="checkbox"/>	

Add Position

**Employees Being Replaced**

*Employee ID	Name
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# Appendix A: Create Job Opening part 4

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

**Job Opening**

Save and Submit | Save as Draft | Recruiting Home | Notification | Start Over

**Job Opening ID** NEW **Status** 005 Draft  
**Job Posting Title** Human Resource Manager **Business Unit** RVCMP (UC Riverside Campus)  
**Job Code** 000625 (HR MGR 2) **Department** D01000 (Graduate School of Education)  
**Position Number** 40002258 (Human Resource Manager) **Primary Recruiting Location** 5026 (Main Campus - UCR)

Job Details | Qualifications | Screening | Job Postings | Hiring Team

There are no current Affirmative Action goals for this Job Group

**Opening Information** ?

\*Template ID 1013 RS Template 1  
**Job Opening Type** Standard Requisition  
**Created By** 79964398 Jacqueline Nguyen  
**Created** 11/07/2017

\*Openings to Fill Limited Number of Openings  
**Target Openings** 1

# Appendix A: Create Job Opening part 5

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

The screenshot shows the Oracle Job Posting creation interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and a breadcrumb trail: 'Recruiting > Create Job Opening'. The Oracle logo is on the left, and links for 'Home', 'Worklist', 'MultiChannel Console', 'Performance Trace', 'Add to Favorites', and 'Sign out' are on the right. Below the navigation bar, the 'Job Postings' section contains a text field for '\*Posting Title' with the value 'Human Resource Manager'. The 'Job Descriptions' section includes a '\*Description Type' dropdown, a '\*Visibility' dropdown, and a 'Template' dropdown. To the right of the 'Job Descriptions' section are navigation links: 'First', '1 of 1', and 'Last'. Below these fields is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, and other formatting options. The main content area is a large text box for the job description.



# Appendix A: Create Job Opening part 6

- Note:** These are sample mockups of how UCR set up their job templates. This is NOT necessarily how a UCB job might look.

The screenshot displays a web interface for creating a job opening. At the top, there is a table with three columns: 'Name', 'Manager ID', and 'Primary'. The first row contains 'Taylor Sudler', '80134405', and a checked checkbox. Below this table are two buttons: 'Add Hiring Manager' and 'Add Hiring Manager Team'. The interface then has four sections, each with a title, a message, and two buttons. The 'Interviewers' section has the message 'No Interviewers have been added to this Job Opening' and buttons 'Add Interviewer' and 'Add Interviewer Team'. The 'Interested Parties' section has the message 'No Interested Parties have been added to this Job Opening' and buttons 'Add Interested Party' and 'Add Interested Parties Team'. The 'Screening Team' section has the message 'No Screening Team has been added to this Job Opening' and buttons 'Add Screening Team Member' and 'Add Screening Team'. At the bottom, there are four buttons: 'Save and Submit', 'Save as Draft', 'Recruiting Home' (with a house icon), and 'Notification | Start Over' (with a notification icon).

Name	Manager ID	Primary
Taylor Sudler	80134405	<input checked="" type="checkbox"/>

[Add Hiring Manager](#) [Add Hiring Manager Team](#)

**Interviewers** ?

No Interviewers have been added to this Job Opening

[Add Interviewer](#) [Add Interviewer Team](#)

**Interested Parties** ?

No Interested Parties have been added to this Job Opening

[Add Interested Party](#) [Add Interested Parties Team](#)

**Screening Team** ?

No Screening Team has been added to this Job Opening

[Add Screening Team Member](#) [Add Screening Team](#)

[Save and Submit](#) [Save as Draft](#) | [Recruiting Home](#) | [Notification](#) | [Start Over](#)

# Appendix B: Applicant experience

- Note:** These are sample mockups of how UCR set up their applicant template. This is NOT necessarily how a UCB job might look.

The mockup displays a multi-step application process. At the top, a horizontal progress bar contains eight steps: Start, Prequalify, Resume, Preferences, Qualifications, Referrals, Self-Identify, and Review/Submit. The 'Resume' step is highlighted with a yellow square. Below the progress bar, a row of buttons includes 'Exit', 'Save as Draft', 'Previous', and 'Next'. The main content area is titled 'Resume - Step 3 of 8' and indicates the user is applying for a 'Human Resource Manager' position. A prompt asks the user to provide their resume. Below this, a section titled 'Resume' contains three options: 'Attach Resume' (with a file upload icon), 'Use Existing Resume', and 'Copy & Paste Resume'. A second prompt asks for a cover letter, followed by a section titled 'Cover Letter (Required)' with an 'Attach Cover Letter' option.

Start Prequalify **Resume** Preferences Qualifications Referrals Self-Identify Review/Submit

Exit Save as Draft | Previous Next

**Resume - Step 3 of 8**

Applying for: Human Resource Manager

Please provide us with your resume.

**Resume**

Attach Resume Provide us with your resume

Use Existing Resume Use a resume you already uploaded with us

Copy & Paste Resume Copy and paste your resume

Please provide us with your cover letter.

**Cover Letter (Required)**

Attach Cover Letter Provide us with your cover letter

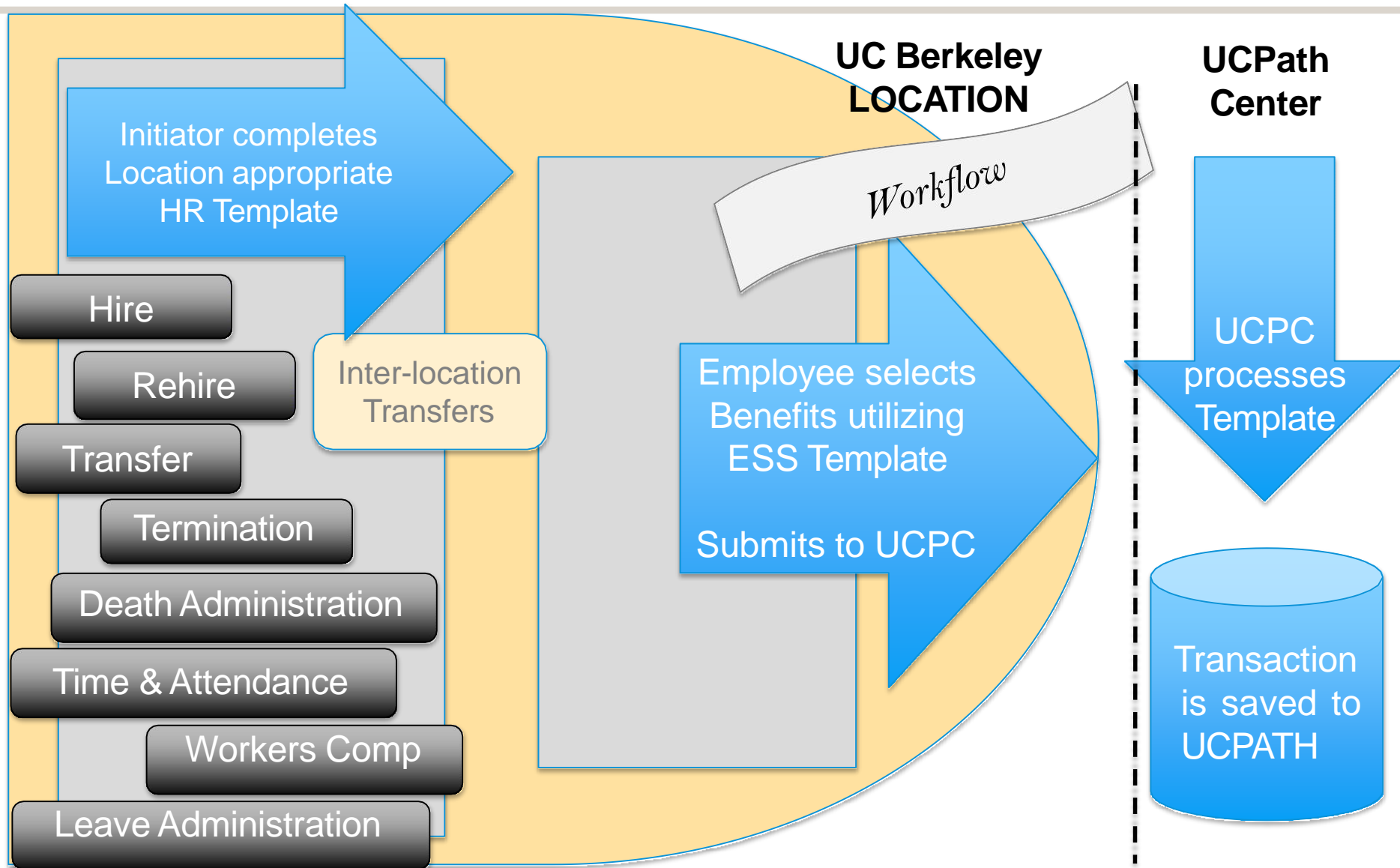


## Benefits

# Benefits Business Context

- The Benefits process will be largely managed by UCOP and UCPC
- The Employee interaction will be largely self serve through the Employee Self Service (ESS) pages within the UCPath system
- Location Involvement in Benefits driven processes will include:
  - Management of Leave Cycle including Maintenance of Expected Return-to-Work status
  - Processing of Leave Requests and Return to Work template.
  - Management of 1,000 hour (or minimum hours) to initiate/maintain/loss of benefits associated with primary job
  - Receipt of Postdoc benefit payments and processing through GL
  - Resolution of any issues arising during transfer of benefits during employee Interlocation Transfer

# Benefits Management Process Flow Slide





# Employee Self Service

## Hire/Transfer/Rehire

1. Employee selects available benefits for self and family within Period of Initial Eligibility (PIE)

## Postdoc Hire/Transfer/Rehire

1. Vendor reports contractual requirement for pay and benefits
2. UCPath is updated
3. Employee selects available benefits for self and family within PIE
4. Where applicable, location receives benefits premium payments

## Termination/Transfer/under 1000 hours

1. Employee benefits are terminated
2. Employee receives notification of eligibility for COBRA

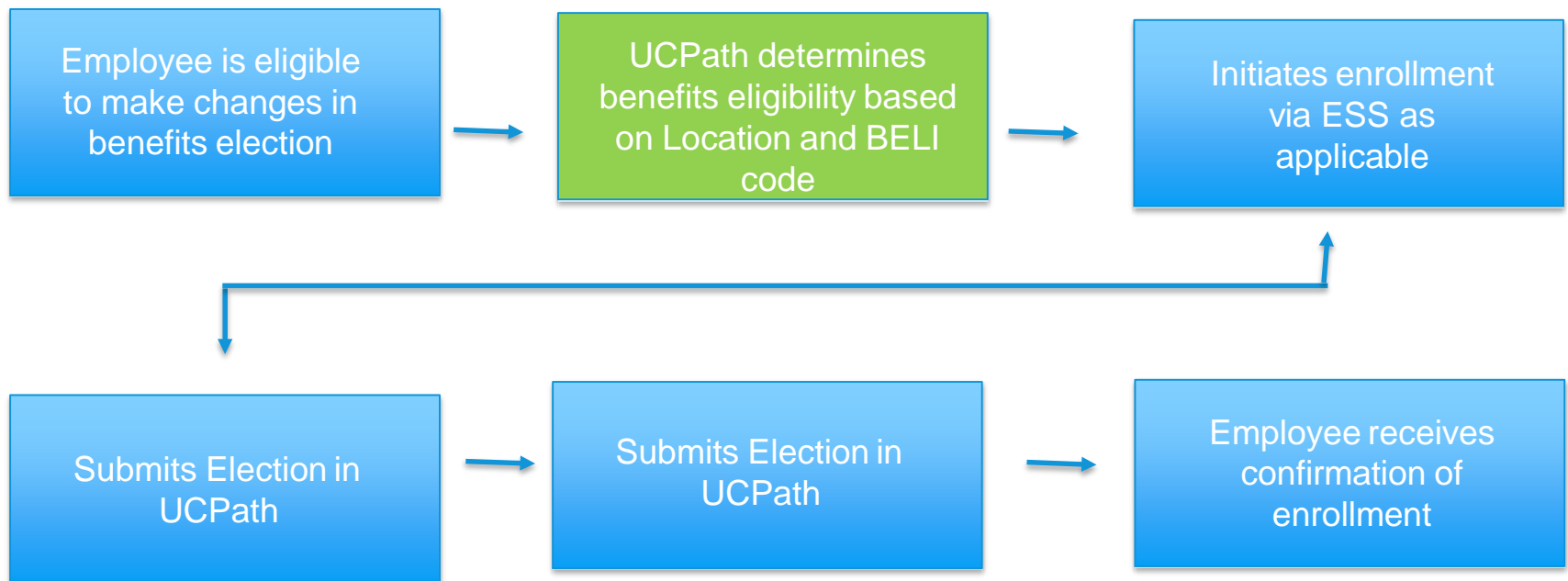
## Leave/Workers Comp

1. Location defines type of leave in paperwork
2. Employee benefits are terminated/suspended
3. Employee receives notification of eligibility for COBRA or Direct Payment for Benefits



## Process Overview – Benefits Enrollment High Level

The employee interaction with the UCPath system through ESS will mirror the current UC Berkeley employee experience.



# Life Events as Managed by Employee Self Serve

1. An employee can record one of the Life Events below in UCPATH.  
(The employee will still be required to provide necessary documentation before the change is accepted into UCPATH.)
  1. Marriage/ Domestic Partnership
  2. Birth of a Child/Adoption of a Child
  3. Divorce
1. Note: there may be additional life events that can trigger a change (such as involuntary loss of coverage at a non-UC employer), but for these, the employee will need to contact the UCPATH Center
2. Employees can enroll or modify components of the below at any time:
  1. AD&D
  2. Supplementary Disability
  3. Supplemental Life
  4. Dependent Life



# UCPath Leave Management

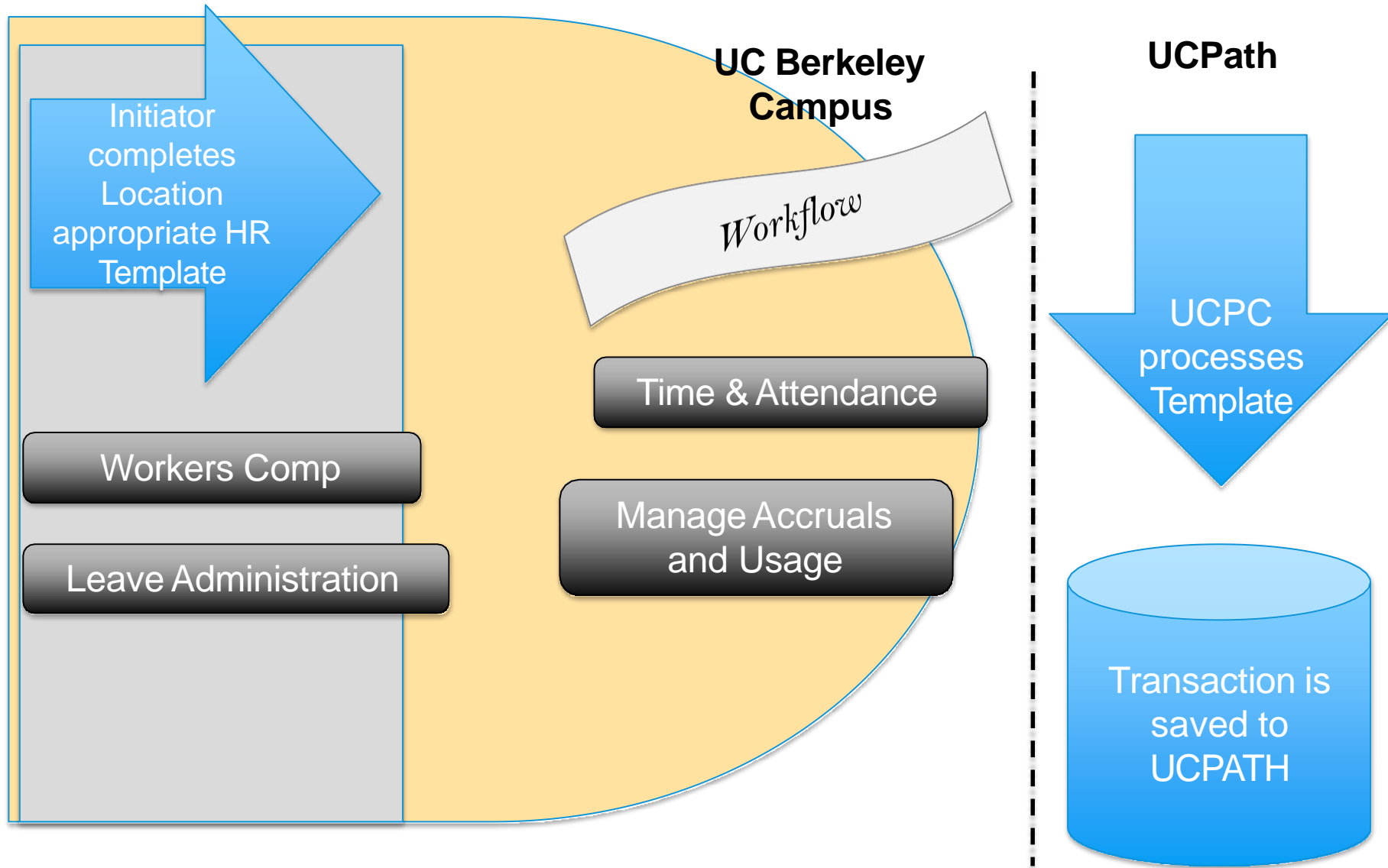
Absence Management module

# Leave Management Business Context

**The UCPATH Absence Management component is the component where leave accruals and takes are managed.**

- The Location councils employee on leave determination and supplies approval for leave outside of UCPATH system before initiating process within UCPATH on behalf of employee
- After initiating leave in UCPATH the subsequent processes are largely managed by UCPC with the exception of keeping expected return date current in UCPATH
  - Subsequent processes include: qualifying Waiver of Premium, Submitting Life, Disability, and AD&D Claims
- Location Involvement in Leave processes will include:
  - Management of Leave Cycle (Initiation of Leave and Maintenance of Expected Return-to-Work status)
  - Updating Time & Attendance files and/or Vacation Usage as necessary

# Leave Administration Process Flow Slide



# Leave Management UCPATH Updates

- UCPATH tracks FMLA hours and eligibility
- FMLA usage can be recorded intermittently in UCPATH
- Multi-headcount positions in Position MGT you can't utilize Paypath to update leave hours.
- If Employee isn't in CalTime a manual workaround will be necessary to update hours.



# Sample Cross-Functional Scenario

Position  
Data

Position  
Funding

TAM

Hire  
Employee

Benefits

ePerf

Initiate and  
approve  
new  
Position

Initiate and  
approve  
Position  
Funding

Initiate and  
approve  
Job posting

Initiate and  
approve  
and submit  
template to  
UCPath  
Center

Employee  
utilizes  
ESS to  
sign up for  
benefits  
during PIE

Initiate  
annual  
review

Position  
Control  
Form

Funding  
Entry  
Template

Job  
Opening  
Template

New Hire  
Template

ESS

Annual  
Performance  
Documents

# 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

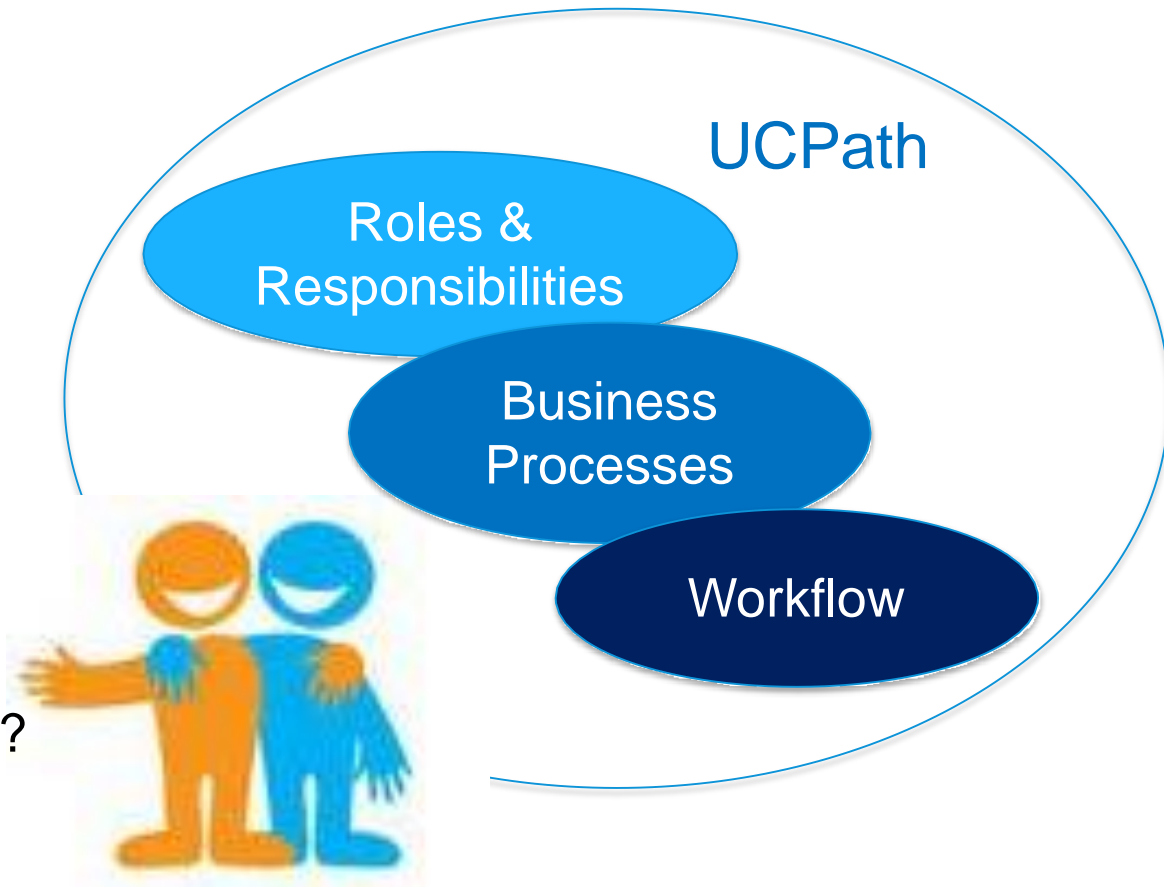
Designing future state

## What comes after that?

Validation of configuration and conversion data

## What can you expect from us?

Collaboration and Partnership





**Questions?**





**Thank You!**