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
  - UCPPath 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
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.

![Job Opening Form](image-url)
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.
Appendix A: Create Job Opening part 3

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Appendix A: Create Job Opening part 4

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Appendix A: Create Job Opening part 5

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Appendix A: Create Job Opening part 6

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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.
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

UC Berkeley LOCATION

Employee selects Benefits utilizing ESS Template

Submits to UCPC

Initiator completes Location appropriate HR Template

Hire
Rehire
Transfer
Termination
Death Administration
Time & Attendance
Workers Comp
Leave Administration

Inter-location Transfers

Workflow

UCPC processes Template

Transaction is saved to UCPATH

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

- Employee is eligible to make changes in benefits election
- UCPath determines benefits eligibility based on Location and BELI code
- Initiates enrollment via ESS as applicable
- Submits Election in UCPath
- Submits Election in UCPath
- Employee receives confirmation of enrollment
Life Events as Managed by Employee Self Serve

1. An employee can record one of the Life Events below in UCPPath.
   (The employee will still be required to provide necessary documentation before the change is accepted into UCPPath.)
   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 UCPPath 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 Wavier 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
Initiator completes Location appropriate HR Template

Workers Comp

Leave Administration

UC Berkeley Campus

Workflow

Time & Attendance

Manage Accruals and Usage

Transaction is saved to UCPATH

UCPath

UCPC processes Template
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

<table>
<thead>
<tr>
<th>Position Data</th>
<th>Position Funding</th>
<th>TAM</th>
<th>Hire Employee</th>
<th>Benefits</th>
<th>ePerf</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate and approve new Position</td>
<td>Initiate and approve Position Funding</td>
<td>Initiate and approve Job posting</td>
<td>Initiate and approve and submit template to UCPath Center</td>
<td>Employee utilizes ESS to sign up for benefits during PIE</td>
<td>Initiate annual review</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position Control Form</th>
<th>Funding Entry Template</th>
<th>Job Opening Template</th>
<th>New Hire Template</th>
<th>ESS</th>
<th>Annual Performance Documents</th>
</tr>
</thead>
<tbody>
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</table>
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?