



UCPath Deep Dives Off-Cycle & Final Pay

April 2018

Objectives for Deep Dive Sessions

Focus on:

- Discovery and information gathering
- Understanding pre-work, post-work and hand-offs
- Process improvement

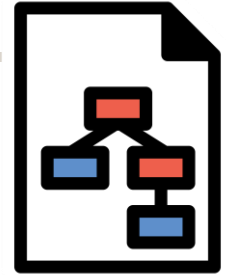
Identifying how UCPath templates, processes and workflow can optimize your business practices

Level Setting

- HCM & PPS are going away
- UCPath System vs. UCPath Center
- Position vs. Position Funding
- EID & Position Numbers are changing
- Approvals in-system: Initiator submits the form, Approvers approve



Workflow Approval Routing



- At least one Approver level per template type, up to three levels depending on template
- Transaction is routed to all Approvers at that level with data permissions for that record
- Can optionally add branching by Employee Class groupings
- Workflow routing rules apply to campus as a whole

Approver Capabilities



- Approvers receive an email link to approve transaction in UCPath
- Transaction approval link also appears in Approver's UCPath Worklist
- 1st Level Approver can “approve” or “deny” back to Initiator with comments
- 2nd and 3rd Level Approvers can also “push back” to previous Approver
- Approvers can edit certain fields based on template, but transaction will be routed to another Approver for approval
- Approvers can add Ad Hoc Approvers, with Approver role and data permissions to access record

Review Types of Templates

Position
Data

Position
Funding

TAM

WFA
Templates

PayPath
Data
Changes

Leaves

Additional
Pay
Final /
Off-Cycle
Pay

Direct
Retro

Deep Dive Sessions

Approach

- Review end-to-end process for business area
- Examine process steps to see where template Initiation and Approval can occur within process
- Review Initiator and Approver roles and knowledge/skills required
- Begin identifying Initiators and Approvers as appropriate for these activities
- Also – Identify and document further business process adaptations and external system changes that could streamline, standardize and optimize future state

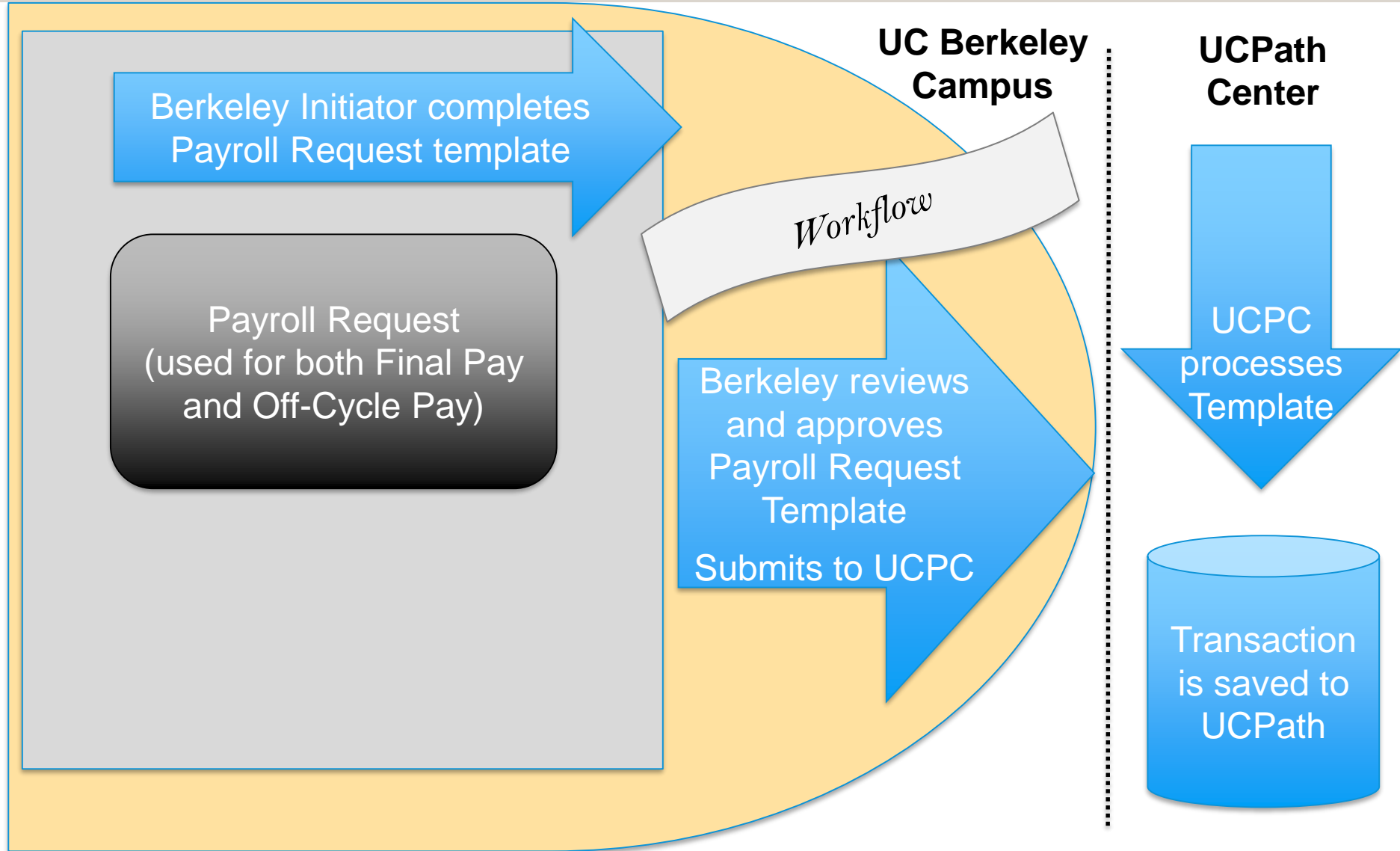
Local Business Process Design - Guiding Principles

Sponsor Alignment	<ul style="list-style-type: none">• Develop efficiency in end-to-end business process• Use UCPATH delivered functionality• Minimize additional cost• Eliminate double data entry
Diverse Campus Stakeholders	<ul style="list-style-type: none">• Involve both academics and staff (at multiple levels)• Maintain a customer focus
Disciplined Process	<ul style="list-style-type: none">• Ensure implementation focus• Use UCPATH delivered templates and approval workflow• Document decisions for clarity and commitment
Openness to Change	<ul style="list-style-type: none">• Maintain enterprise-wide perspective• Be open to process and role changes• Be transparent with communications

Off-Cycle/Final Pay Overview

- The Payroll Request form is used to request both off-cycle checks and final pay.
- Off-cycle check distribution defaults to an employee's standard pay distribution (e.g., direct deposit, paper check).
- Separations are submitted using two forms: the Termination form, to request to end the employee's job, and the Final Pay request, to pay out the employee's remaining final pay and accruals.
- Checking the "Payout Accruals?" checkbox on the Final Pay form automatically calculates the employees accruals for their final paycheck.
- No information needs to be entered into the "Leaves" tab unless accruals need to be adjusted for the current pay period.

Payroll: Payroll Request (Final Pay & Off-Cycle Pay)



DEMO

Off-Cycle/Final Pay and Approval

UCB Initiator Role

Template(s): Payroll Request

Knowledge/Skills

- Knowledge of applicable policies, procedures, and processes related to off-cycle checks, rush checks, and final pay
- Expertise in off-cycle/final pay templates entry and processing
- Attention to accuracy and detail to identify and enter correct and appropriate values
- Proficiency in PeopleSoft navigation, data entry, search techniques and business rules

UCB Approver Role

Template(s): Approve Payroll Request

Knowledge/Skills

- High-level understanding of organizational and financial impact of transaction
- Understanding of duty and accountability
- Commitment to thorough review and response