UCPath – UCB
Deep Dive Sessions: Leave Management
April – May – June 2018
Objectives for Deep Dive Sessions

Focus on:

- Discovery and information gathering
- Understanding pre-work, post-work and handoffs
- Finding process improvement opportunities

Identifying how UCPath templates, processes and approval workflow can OPTIMIZE campus business practices
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**
- Develop efficiency in end-to-end business process
- Use UCPath delivered functionality
- Minimize additional cost
- Eliminate double data entry

**Diverse Campus Stakeholders**
- Involve both academics and staff (at multiple levels)
- Maintain a customer focus

**Disciplined Process**
- Ensure implementation focus
- Use UCPath delivered templates and approval workflow
- Document decisions for clarity and commitment

**Openness to Change**
- Maintain enterprise-wide perspective
- Be open to process and role changes
- Be transparent with communications
Two-Day Discovery Sessions

For each processing area:

- Overview and business process context for transaction
- Transaction demonstration
- Knowledge and skills needed for transactional role
- Discuss workflow and potential approval scenarios
Before we begin…

• UCPath is a PeopleSoft HCM system
• HCM & PPS will be replaced by UCPath HCM
• UCPath Center (UCPC) is a new customer service center supporting all campuses and located in Riverside, CA
• In UCPath we will have:
  • New Employee ID numbers
  • New Position Numbers
  • Approval routing in-system - Initiator submits, Approver approves
UCPath System Modules

UCPath

- Absence Management
- Base Benefits
- Benefits Administration
- Compensation
- Employee Self Service
- Organizational Development
- Benefits Billing
- Payroll for North America
- Workforce Development
- Commitment Accounting
- Workforce Administration
Leave Management Overview

- The Location is responsible for providing employee counseling and approval of leave determination before initiating process within UCPATH on behalf of employee.
- An expected Return Date is required to initiate a leave of absence.
- After initiating leave in UCPATH the subsequent processes are largely managed by UCPC with the exception of:
  - maintaining expected return date current in UCPATH
  - 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
  - Subsequent processes include: qualifying Wavier of Premium, Submitting Life, Disability, and AD&D Claims
- UCPath tracks FMLA hours and eligibility and can be recorded intermittently.
Leave Administration Process Flow Slide

UCB Campus Workflow

UCB Initiator completes appropriate Template

UCB Reviews and Approves Request

UCPC processes Template

Transaction is saved to UCPATH
Extended Absence Pages and Components

- **Workforce Job Summary Page**
  - This page specifies details about the employee’s job and job history, such as position, job code, compensation, HR status and payroll status.

- **Career and Benefits Elig Hrs INQ**
  - Use this component to view an employee’s leave, career and benefits eligibility hours viewed with effective dated fields.

- **Admin-Review Absence Balance**
  - This component includes view of current balance and accrual for pay period by appointment AND employee’s leave accrual, entitlements (FMLA, CFRA, PDLL) and other leave.
Extended Absence Pages and Components

**Request Extended Absence**

Use this component to create an extended absence request, to determine FMLA, CFRA and PDLL eligibility and to attach leave documentation.

**Administer Extended Absence**

Use this component to update leave information, manage attachments and review the leave approval process.

**Manage Accruals**

Manage leave accrual adjustments for catastrophic leave and sabbatical credits entered by Locations.
Template Demos
Approval Routing

- At least one Approver level is required per template
- Number of levels applies to campus as a whole
- Transaction is routed to all Approvers at that level with data permissions for that record
- Optional branching by Employee Class groupings
- Approvers receive email with link to approve transaction; approval link also appears in Approver’s UCPPath 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
- Some templates allow Approvers to edit certain fields, but may be routed to another Approver for approval
- Approvers can add Ad Hoc Approvers, with Approver role and data permissions to access record
Leave Management Request and Approval

**UCB Initiator Role**

Knowledge/Skills
- Understanding of general leave policy and specific employee request
- Ability to consult to acquire relevant expertise in Leave policy to complete template entry and processing
- Leave Management business rules and guidelines
- 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**

Knowledge/Skills
- High-level understanding of organizational impact of transaction
- Understanding of duty and accountability
- Commitment to thorough review and response
### Sample Workflow Paths – Leave Management

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Pre-work</th>
<th>Initiator</th>
<th>Approver</th>
<th>UCPath Center</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FMLA</strong></td>
<td>Employee consults with Manager*</td>
<td>Manager</td>
<td>HR/AP Manager or Admin</td>
<td>Reviews Transaction and makes necessary updates to Job Data in WFA</td>
</tr>
<tr>
<td><strong>Sabbatical</strong></td>
<td>Employee consults with Manager*</td>
<td>HR/AP Admin</td>
<td>Manager</td>
<td></td>
</tr>
<tr>
<td><strong>Workers Compensation</strong></td>
<td>Employee consults with Manager, Manager Consults with HR Admin/Manager**</td>
<td>HR/AP Manager or Leave Admin**</td>
<td>Manager</td>
<td></td>
</tr>
</tbody>
</table>

*Manager may consult with HR/Leave Management SME for applicable policy and procedures regarding leave.

** HR Admin/Manager works with Employee Relations for case management
Thank You!
## Short Work Break – Staff Types & Criteria

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partial-Year Career Furlough</td>
<td>Used to place a partial-year career employee on furlough. Action Reason selection will be based on the number of working months the partial-year career employee is scheduled to work: 9, 10, or 11 months.</td>
<td>Not to exceed a cumulative total of 3 months in a calendar year.</td>
</tr>
<tr>
<td>Floaters</td>
<td>Used for floater employees during periods of inactivity.</td>
<td>Limited to 4 consecutive calendar months. SWB can only be used when the department intends for the floater to return to employment following the SWB. If this is unknown, the employee should be terminated. The SWB should not exceed the floater's job record end date.</td>
</tr>
<tr>
<td>Limited Employees</td>
<td>Used for limited employees off pay status.</td>
<td>Limited to 4 consecutive calendar months. SWB can only be used when the department intends for the limited employee to return to employment following the SWB. If this is unknown, the employee should be terminated. The SWB should not exceed the employee's job record end date.</td>
</tr>
<tr>
<td>Undergraduate Students</td>
<td>Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters/semesters.</td>
<td>Limited to 4 consecutive calendar months. SWB can only be used when the department intends for the student employee to return to employment following the SWB. If this is unknown, the student employee should be terminated. The SWB should not exceed the student's job record end date.</td>
</tr>
</tbody>
</table>