UCPath – UCB

Deep Dive Sessions: Leave Management

April – May – June 2018

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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

| Position Data	Position Funding	TAM	WFA Templates	PayPath Data Changes	Leaves	Additional Pay Final / Off-Cycle Pay	Direct Retro

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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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
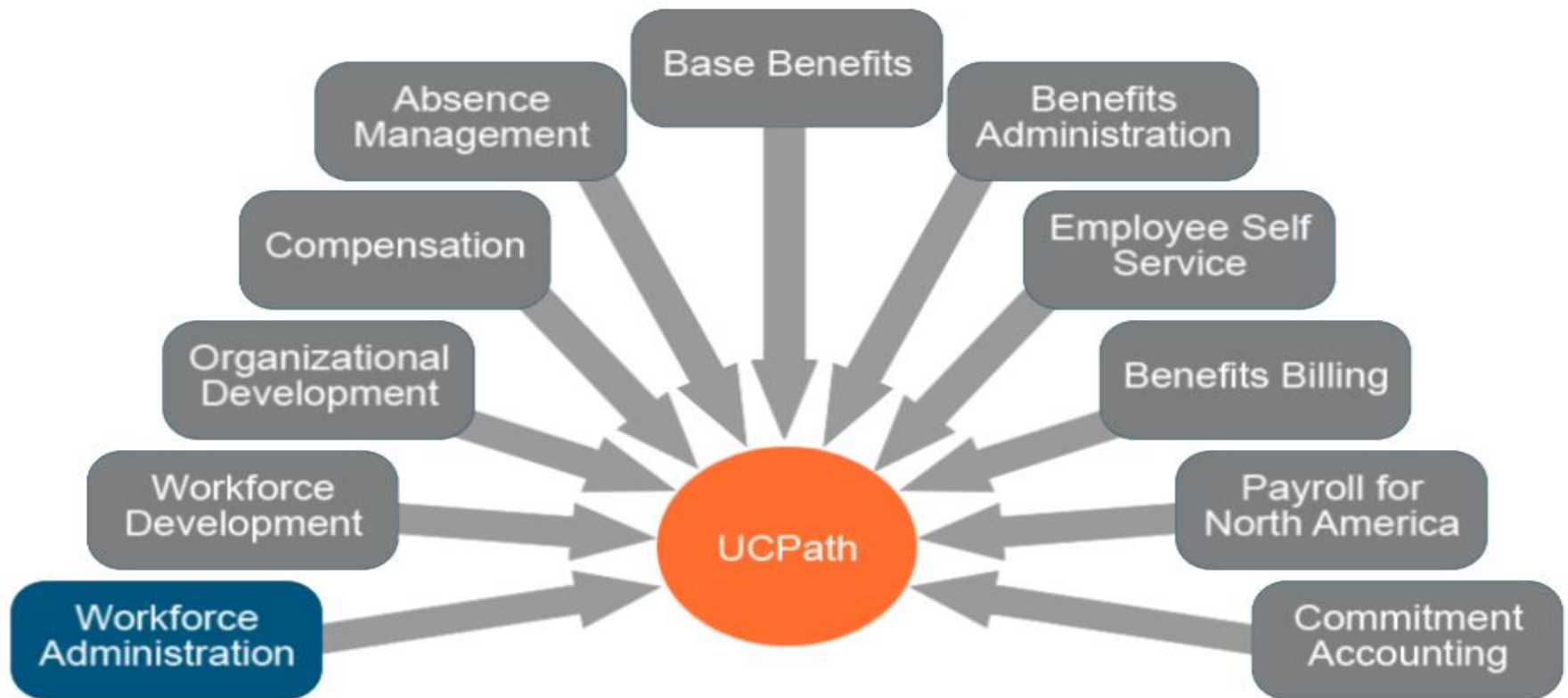
Leave Management Overview

- 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 :

  o maintaining expected return date current in UCPATH

  o Management of Leave Cycle (Initiation of Leave and Maintenance of Expected Return-to-Work status

  o Updating Time & Attendance files and/or Vacation Usage as necessary

  o 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
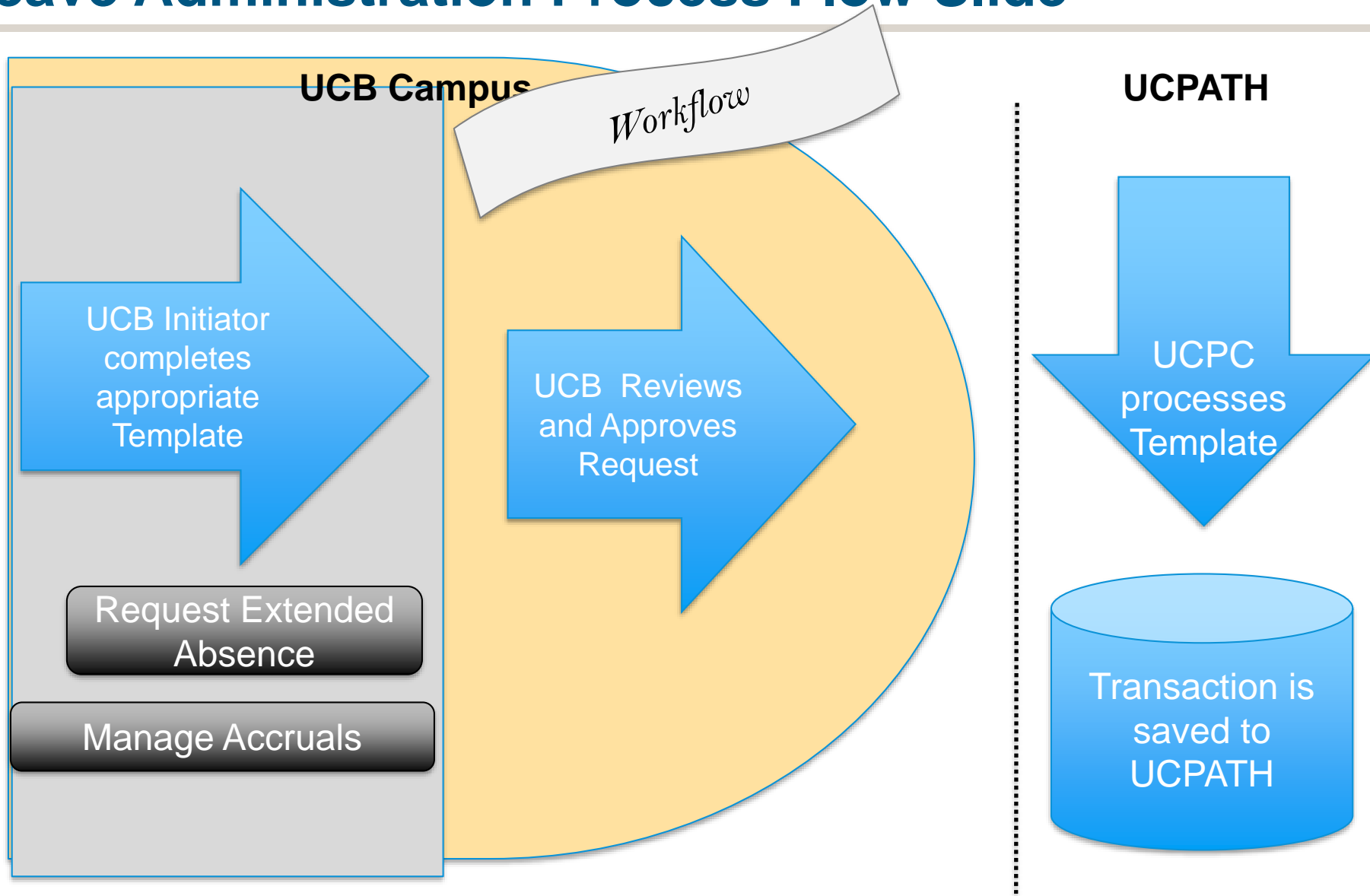
Extended Absence Pages and Components

VIEW

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.

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

Extended Absence Pages and Components

ACTION

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.

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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 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
- 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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

Sample Workflow Paths – Leave Management

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

*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

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA

Thank You!

Short Work Break – Staff Types & Criteria

Type	Description	Criteria
Partial-Year Career Furlough	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.	Not to exceed a cumulative total of 3 months in a calendar year.
Floaters	Used for floater employees during periods of inactivity.	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.
Limited Employees	Used for limited employees off pay status.	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.
Undergraduate Students	Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters/semesters.	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.

Berkeley | UCPath
UNIVERSITY OF CALIFORNIA