UCPath – UCB

Deep Dive Sessions: PayPath Data Changes

April – May – June 2018

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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

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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

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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

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Two-Day Discovery Sessions

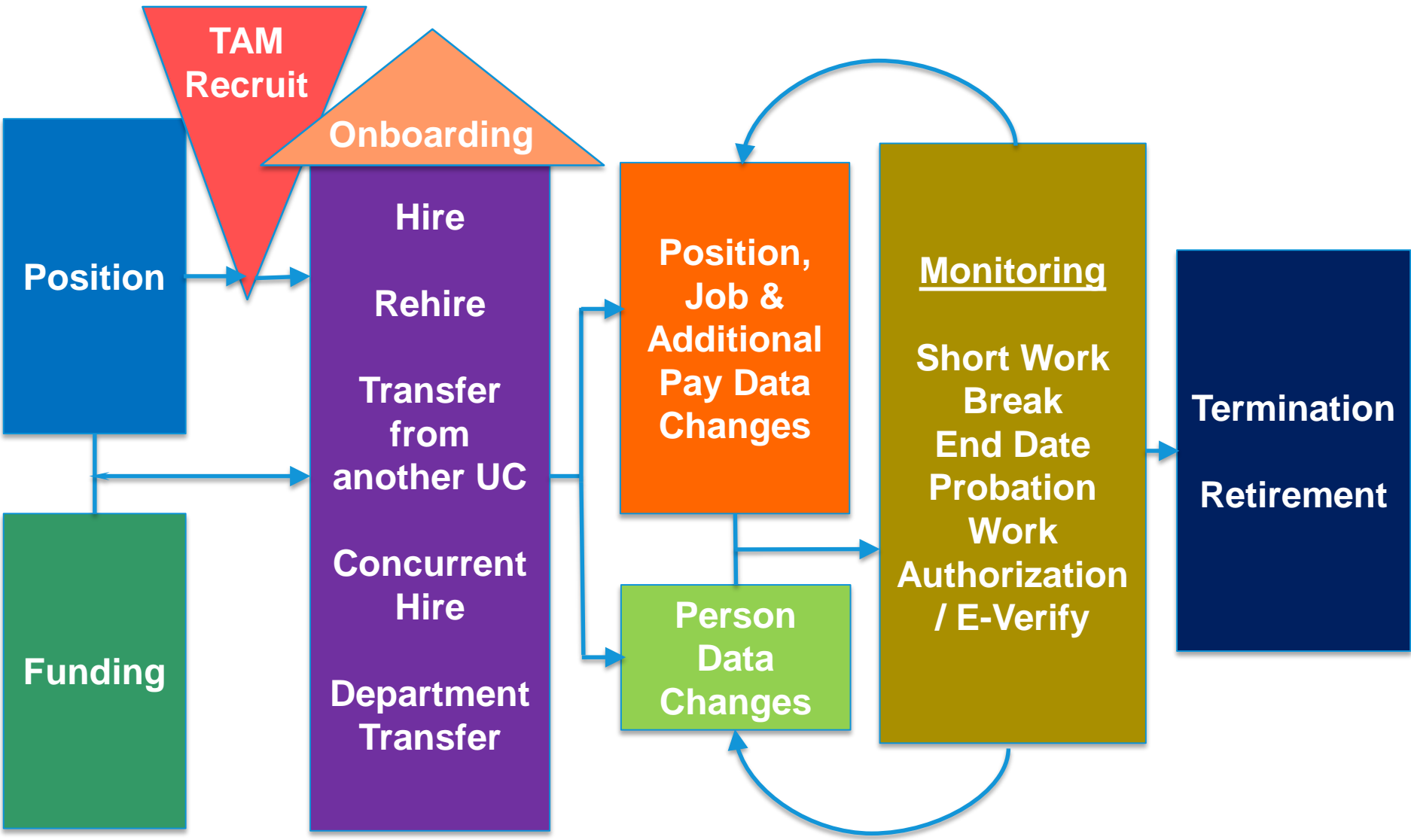| Position Data	Position Funding	TAM	WFA Templates	PayPath Data Changes	Leaves	Additional Pay Final / Off-Cycle Pay	Direct Retro

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

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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

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UCPath HR Process Flow at a Glance

Position

Funding

TAM Recruit

Onboarding

Hire

Rehire

Transfer from another UC

Concurrent Hire

Department Transfer

Position, Job & Additional Pay Data Changes

Person Data Changes

Monitoring

**Short Work Break
End Date
Probation
Work Authorization
/ E-Verify**

**Termination

Retirement**

Workforce Administration
PayPath
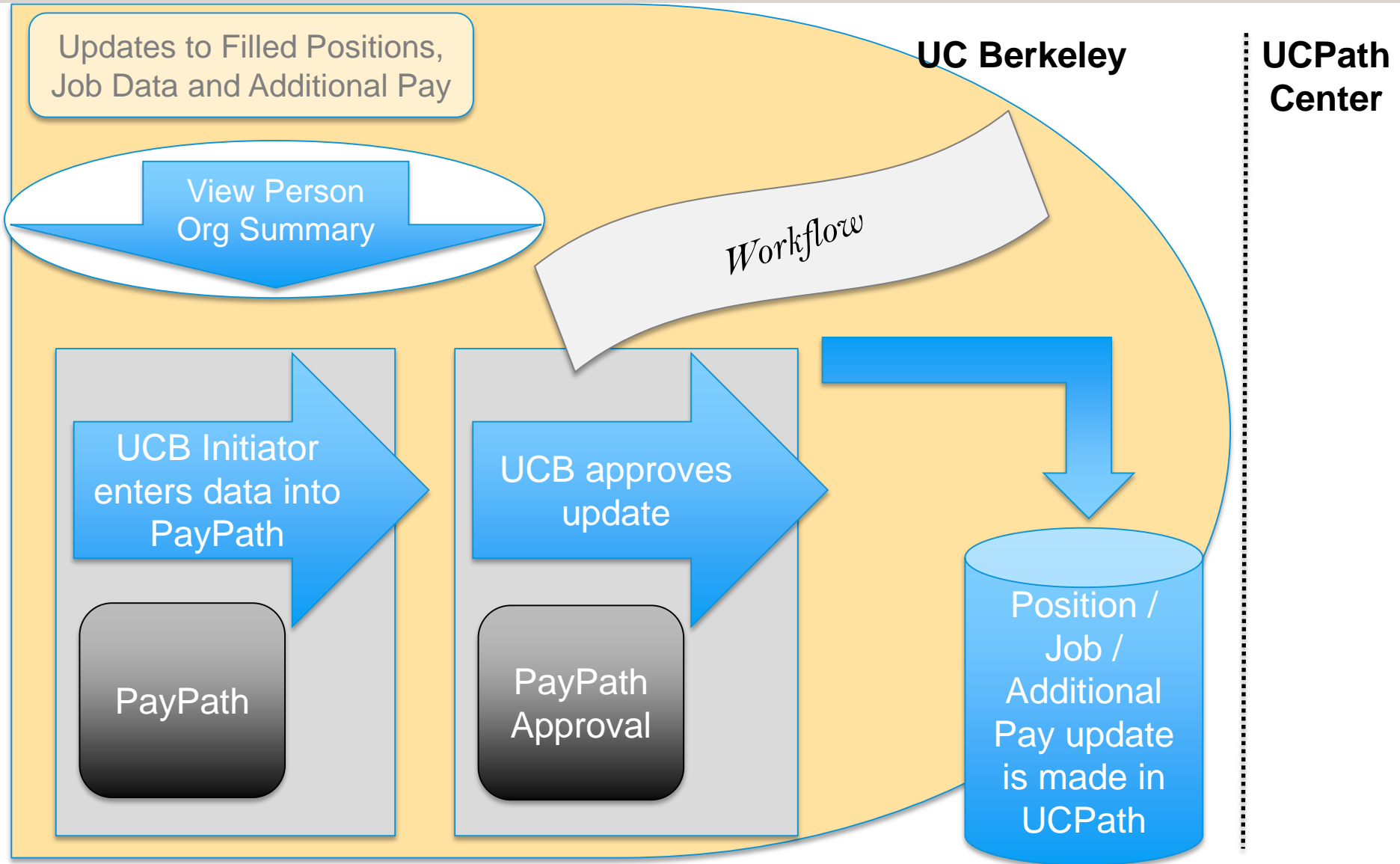# Position and Job Data Changes

PayPath Overview

- Custom-built component for updating Position, Job and Additional Pay in a single transaction for various Action/Reasons

- Requires position to be single headcount for updating Position data

- Also has mass spreadsheet upload capability

Sample PayPath Data Changes

Position	Job	Additional Pay
❑ FLSA	❑ Job Earnings Distribution	❑ Stipend
❑ Position FTE	❑ Pay Rate Change	❑ Incentive Award
❑ Job FTE Override	❑ Short Work Break	❑ Honorarium
❑ ERC	❑ Data Change	❑ Housing Allowance
❑ Promotion	❑ Percent Time	❑ Perquisite
❑ Reports To	❑ Appointment Extension	❑ Relocation
	❑ SWB Extension	

PayPath Business Process

UC Berkeley

UCPath Center

Updates to Filled Positions, Job Data and Additional Pay

View Person Org Summary

Workflow

UCB Initiator enters data into PayPath

PayPath

UCB approves update

PayPath Approval

Position / Job / Additional Pay update is made in UCPath

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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

Template Demos

Short Work Break (SWB)

NEW

- Used to stop pay during break period for a returning employee – rather than terminating and rehiring

Class	Type
Staff	Partial-Year Career Furlough
	Floater
	Limited
	Undergraduate Students
Academic	Academic Students
	Unit 18- Benefits Bridge Eligible
	Unit 18- Benefits Bridge Not Eligible
	University Extension (UNEX)
	Variable Appointment
	Research Funding Bridge

Break period takes place *within* appointment dates – Set, or extend, appointment end date to cover work break period

- UCB will be responsible for monitoring employees on SWB and taking appropriate action to return employee, extend appointment or terminate job

- UCPath Center will monitor SWB Audit Report to identify SWBs that exceed criteria and will work with UCB to confirm appropriate course of action

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.

Short Work Break – Academic Types & Criteria

Type	Description	Criteria
Academic Students	Used to put academic students off pay status over the summer or in between quarters/semesters.	Limited to 4 consecutive months. Must only be used when there is an intent to return to student employment at the end of the SWB, but the job does not necessarily need to be in place.
Unit 18-Benefits Bridge Eligible	Used to put a Unit 18 employee off pay status in between quarters/semesters of active employment. Employee is eligible to request a Benefits Bridge.	Limited to 3 consecutive months. Non-Continuing Unit 18 titles must have an approved job to which they will return at the end of the SWB, otherwise a termination should occur.
Unit 18-Benefits Bridge Not Eligible	Used to put a Unit 18 employee off pay status in between quarters/semesters of active employment. Employee is not eligible to request a Benefits Bridge.	Limited to 12 consecutive months. Non-Continuing Unit 18 titles must have an approved job to which they will return at the end of the SWB, otherwise a termination should occur.
University Extension (UNEX)	Used to put a UNEX Teacher off pay status in between periods of active employment.	Limited to 6 consecutive months. Must only be used when there is an approved job/contract to which they will return at the end of the SWB, otherwise a termination should occur.
Variable Appointment	Used to put an exempt academic employee with a highly variable schedule off pay status in between periods of active employment.	Limited to 12 consecutive months. Used during periods of inactivity for exempt academic appointees with intermittent service (e.g. seasonal or on-call).
Research Funding Bridge	Used to put an employee awaiting research funding on SWB.	Limited to 4 consecutive months. Used when the employee is not working and there is an approved reappointment that is pending the arrival of contract/grant funding. There must be proof of incoming funding.

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Auto-Termination of Jobs with End Dates

UCPath takes a <u>proactive</u> approach to terminating job records with End Dates:

NEW

- End Job Automatically

  o Staff jobs are defaulted to "End Job Automatically" by Employee Class: Contract, Limited, Student, Floater, Rehired Retiree, Per Diem

  o Academic job record templates include an "End Job Automatically" checkbox which can optionally be selected on Hire and Transfer templates or updated in PayPath

- UCPath Center will run a process before each Payroll to automatically terminate staff job records when End Date is reached, and academic job records when End Date is reached and End Job Automatically checkbox is checked

- UCB will be expected to proactively monitor job records with End Dates, and take appropriate action to extend appointment if not terminating, or in case of Academics where checkbox is not checked, to take positive action to terminate or extend appointment

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PayPath Data Changes - Request and Approval

UCB Initiator Role

Knowledge/Skills

- Solid understanding of transactions, policies and data for staff, student and/or academic employees
- Understanding of business rules and guidelines around Person, Job and Compensation data, distribution of earnings to identified Earnings Codes (e.g., ERIT, Workers' Comp), Academic components of pay (for Academic processing), and Action-Reason
- Expertise in PayPath data entry and processing
- Familiarity with PeopleSoft effective dating, payroll cycles and how HR actions impact pay and interact with pay-related processes
- 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 and financial impact of transaction
- Understanding of duty and accountability
- Commitment to thorough review and response

Sample Approval Scenarios – PayPath Updates

Scenario	Pre-work	Initiator	Approver 1	UCPath Center
A		Dept. Manager	HR Manager	N/A
B	Dept. Manager	HR Admin/Gen	HR Manager	
		HR Manager	Division Manager	
C	PI	AP Admin/Gen	AP Manager	
		AP Manager	Dept. Dean	