UCPath – UCB

Deep Dive Sessions:
Person Data – Transfer – Termination – Retirement

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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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

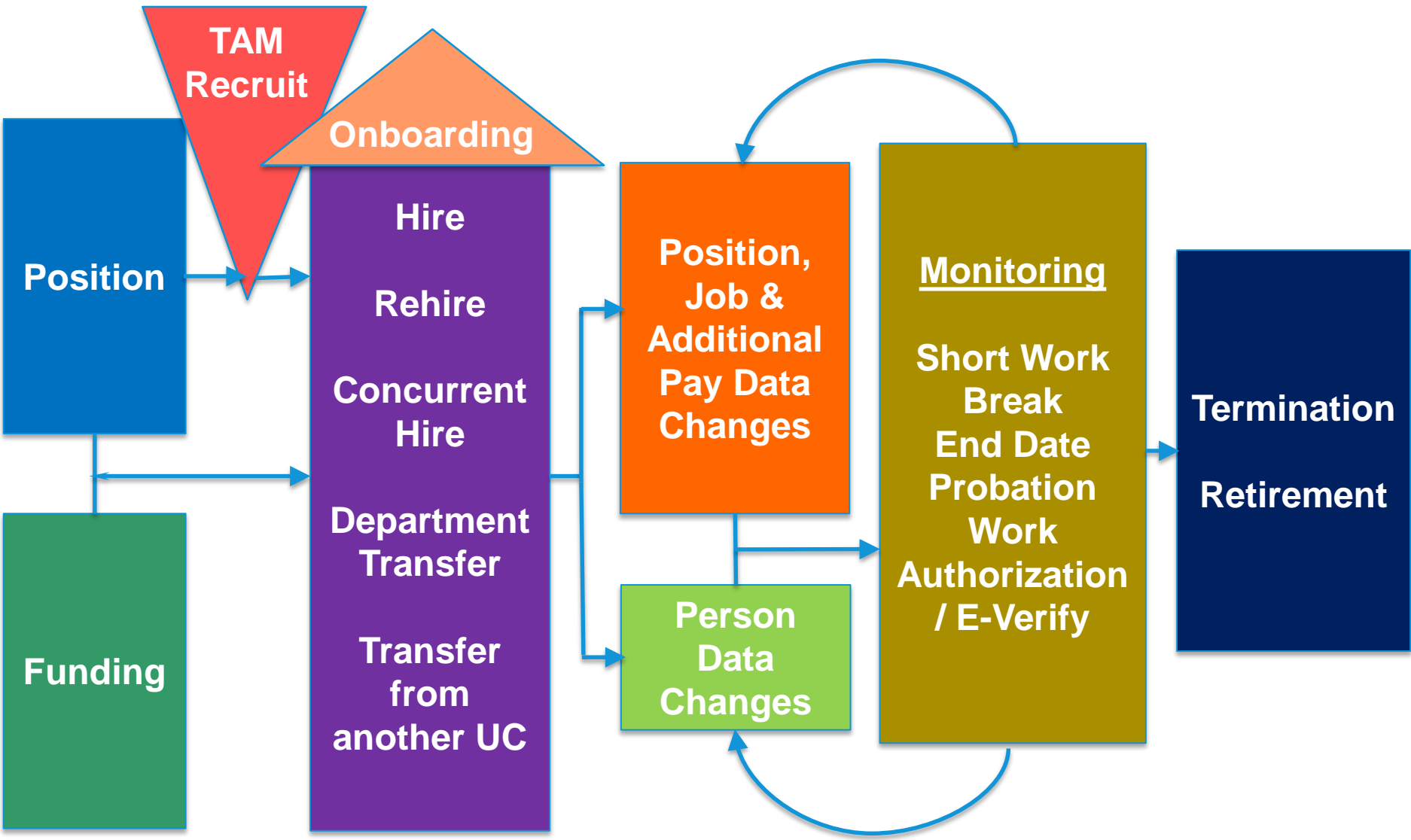| Position Data	Position Funding	TAM	WFA Templates	PayPath Data Changes	Leaves	Additional Pay Final / Off-Cycle Pay	Direct Retro

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

TAM Recruit

Onboarding

Position

Funding

Hire

Rehire

Concurrent Hire

Department Transfer

Transfer from another UC

Position, Job & Additional Pay Data Changes

Person Data Changes

Monitoring

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

Termination

Retirement

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Workforce Administration

HR Templates II

Person Data – Transfer – Termination – Retirement

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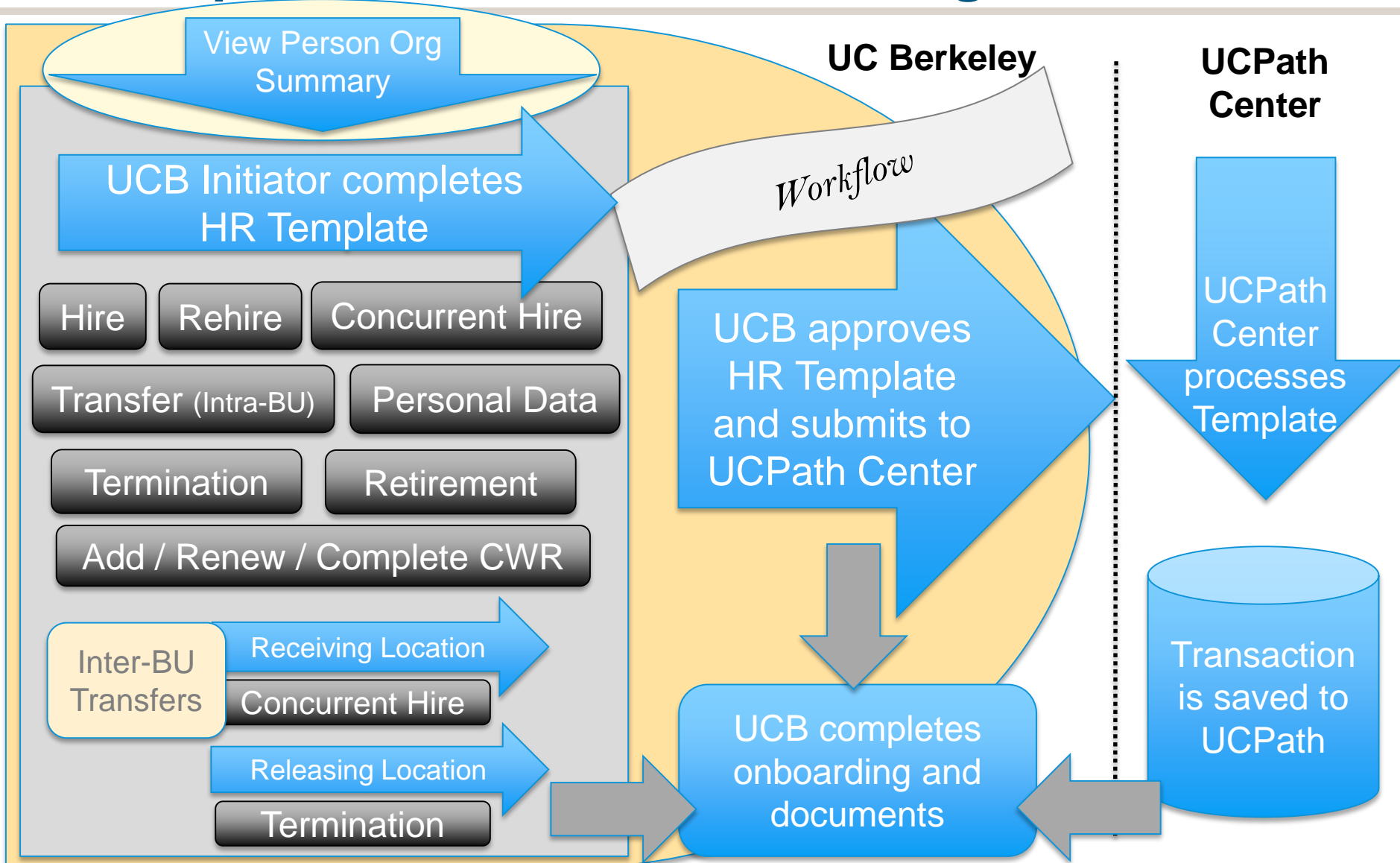UNIVERSITY OF CALIFORNIA

HR Templates Overview

- UCB enters data into HR templates which are routed for UCB approval and then submitted to UCPath Center for final processing into Person and Job records

- UCPath HR templates require similar information to current state HCM transactions, though with fewer Save-Edits and system-enforced rules

- A solid understanding of each template's purpose, as well as strong familiarity with Action-Reason, will be required for processing HR templates

HR Templates

Template	Description
UC_ADD_CWR	Add Contingent Worker - No Position Data
UC_ADD_CWR_POSN	Add Contingent Worker With Position
UC_COM_CWR	Complete Contingent Worker Instance
UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer
UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer
UC_EXT_CWR	Extend CWR Appointment
UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment
UC_FULL_HIRE	Full Hire - Staff Only
UC_FULL_HIRE_AC	Full Hire - Academic Use Only
UC_INVOL_TERM	Involuntary Termination
UC_PERSON_DATA	UC Personal Data
UC_REHIRE	UC Rehire - All Employees
UC_REHIRE_AC	Rehire - Academic
UC_RENW_CWR	Renew Contingent Worker - Without Position
UC_RENW_CWR_POS	Renew CWR Instance - with Position
UC_RETIREMENT	Retirement
UC_TRANSFER	Intra-Business Unit Transfer - Staff Only
UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only
UC_VOL_TERM	Voluntary Termination

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HR Template Transaction Processing

UC Berkeley

UCPath Center

View Person Org Summary

UCB Initiator completes HR Template

Workflow

Hire   Rehire   Concurrent Hire

Transfer (Intra-BU)   Personal Data

Termination   Retirement

Add / Renew / Complete CWR

Inter-BU Transfers

Receiving Location

Concurrent Hire

Releasing Location

Termination

UCB approves HR Template and submits to UCPath Center

UCPath Center processes Template

UCB completes onboarding and documents

Transaction is saved to 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

Intra-BU Transfer (aka Department Transfer)

- When an employee takes a job in a new UCB department with no break in service

- Tabs include Job Data and JED – no Additional Pay

- According to UCPath published business process, the releasing Department initiates the intra-location transfer template:

  > The recommended business process is that the 'From-Dept' should initiate the transaction with minimal data. Approval routing goes to the 'To-Deptid' approvers. The 'To-Dept' approvers can then complete the transaction by entering additional details such as compensation etc.

- This is not UCB's current practice; should be discussed

Template Demo

Inter-BU Transfer

Definition:

- When an employee leaves one UC location to take a new job at another UC location with no break in service

- Processed as Receiving location's Concurrent Hire and Releasing location's Termination, so both locations retain access to their respective records

- Locations should enter a Comment in the Termination template informing UCPC that the termination is an Intra-BU Transfer and include the BU to which the employee is transferring

- UCPC processes Concurrent Hire template prior to the Termination template to ensure no break in service

Notes while all locations not yet up on UCPath:

- **Full Hire** template must be used if the employee is coming from a location not yet on UCPath, because the employee does not yet exist in UCPath and needs a new Empl ID

- When an employee transfers from a non-UCPath Location, non-UCPath Location must provide employee's benefit and payroll information by submitting the UFIN301 forms

- When an employee transfers from a UCPath Location to a non-UCPath Location, UCPC WFA Production must initiate the UFIN301 forms

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Terminations & Retirement

- A Termination template must be submitted for each job record to be terminated (for Death or Retirement, UCPath Center will verify and terminate all jobs)

- The **Last Date Worked** automatically populates with a date that is one day prior to the **Job Effective Date** (If **Job Effective Date** is a Monday, the **Last Date Worked** defaults to the previous workday (Friday). **Last Date Worked** field can be changed, but must be prior to **Job Effective Date**.

- UCB is responsible for managing and maintaining separation packets including UI form and Termination Benefits checklist and for retaining documentation per records retention policy and procedures

- UCPath Center HR/APO Support Manager will work with UCB regarding highly sensitive terminations that do not meet documented standard process

- Final pay is required when an employee is separated and all other jobs are terminated or retired.

- The termination and retirement templates provide a link for initiating final pay after entering the template. Access to the link, **Add Payroll Request**, is determined by UCB's local business process and requires a separate security role.

Template Demo

Personal Data Changes

Self-Service by Employee

- Employees may update their own Personal Data using Self-Service portal for Name, Personal Email, Emergency Contacts, Home and Mailing Address, Disclosures, Phone, Ethnicity, Military Status, Disability Status

Personal Data HR Template by Administrator

- Personal Data template with workflow can be used to update any of above; must be used to update DOB or SSN which require verification before final processing into UCPath, include a Comment as to what was changed

Case with UCPC

- UCB must open a case with UCPC when change requires documentation to verify, e.g., gender marker change requires government-issued ID to support change

- Administrators can directly update Emergency contacts, Additional Names, Security Clearance

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Template Demo

HR Templates Request and Approval

UCB Initiator Role

Knowledge/Skills

- Solid understanding of Human Resources actions, 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 HR template 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

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Sample Approval Scenarios – HR Templates

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

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