Thank you for joining us today!
When we end these sessions, we hope we have:

- Provided a foundational understanding of UCPath transaction templates, process steps and workflow routing
- Enabled you to begin identifying roles and adapting work processes to optimize UCPath capabilities at UC Berkeley
What is UCPath?

A single solution for Human Resources, Payroll and Benefits processing, for all UC campuses and medical centers, going live at UC Berkeley in March 2019.
Project Timeline UC-wide

2018

Los Angeles, Santa Barbara (~60k EEs)

9/1/18

Berkeley, Davis, Irvine, ANR (~78k EEs)

3/1/19

TAM/ePerf

2019

Santa Cruz, San Francisco, San Diego, Hastings, LBNL (~70k EEs)

9/1/19
Major Work Efforts Currently Underway at UCB

- Data Mapping
- Business Process & Workflow Design
- System Integration

You are here.
## What’s on the table for UCB discussion?

### Off the Table
- System design, processing and data flow within UCPath – Complete!
- Wholesale replacement of external ticketing systems and processes – Out of scope!
- When UCB goes live – Decided!

### On the Table
- Business processes, roles and workflow at UC Berkeley – Definitely!
- Enhancement and modification of external ticketing systems and processes to optimize UCPath capabilities – Certainly!
- How well-prepared UCB is for going live – Absolutely!
Foundational Changes Impacting UCB Processes

Approval Workflow

• Data are entered into request templates at outset of process and, once approved, moved into live records, eliminating substantial double-entry at end of process

Distributed Roles and Responsibilities

• Individuals directly impacted by requested action can have hands-on role in initiating and approving transactions, reducing back-and-forth activity in external routing systems

UCPath Center

• Maintains consistency across all UC locations
• Provides technology support and maintenance
• Centralizes certain business processes and functions
Foundational Changes (cont.)

Position Funding

• Position Funding requests are separate transactions from Position and Hiring requests, allowing for new roles specifically to approve financial impact of transaction

HR and Payroll Data Integration

• Eliminates time-consuming re-work practices that were necessary for passing data accurately to PPS
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
<table>
<thead>
<tr>
<th>Type of Requestor</th>
<th>Type of Employee</th>
<th>Funding Source</th>
<th>External Systems &amp; Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational Manager</td>
<td>Staff</td>
<td>Contracts &amp; Grants</td>
<td>ServiceNow</td>
</tr>
<tr>
<td>Faculty / PI</td>
<td>Faculty</td>
<td>Non-Contracts &amp; Grants</td>
<td>SmartSheets</td>
</tr>
<tr>
<td>Lab Manager</td>
<td>Non-Faculty Academic</td>
<td></td>
<td>Department Intranet</td>
</tr>
<tr>
<td>Researcher</td>
<td>GSI / GSR</td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td></td>
<td>Student</td>
<td></td>
<td>Attachments</td>
</tr>
</tbody>
</table>
### 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
Position Management
(New and Vacant Positions)
Future State Discovery Overview
3/13-14/18
UCPath Position Management Overview

- A position represents a filled or vacant role in a department
- All employees, and CWRs who supervise others, will be in a Position
- UCPath Position data include Job Code, Department, FLSA, Location, Reports To, Salary Plan/Grade, Headcount, *FTE and ERC
- Position numbers are sequential – all campuses in same numbering system

- Funding is linked to Position and set up on the Funding Entry page in Commitment Accounting

- Position data elements, including Funding and Reports To, are tied to all incumbents sharing a Position and are not editable on individual Job records – likely means breaking out multi-headcount positions to single headcount in many cases
Position Management Business Process

New Positions
Updates to Vacant Positions

UCB Initiator enters data into request form
Position Request

UCB approves request
Position Approval

Position is created or updated in UCPath

Note: Updates to filled positions are performed using custom ‘PayPath’ component
Position Request and Approval (New / Vacant)

**UCB Initiator Role**

**Template(s)** Position Request

**Knowledge/Skills**

- Familiarity with vacant and filled positions in department
- Knowledge of policies, procedures and processes applicable to Position Management
- Understanding of Position Management business rules and guidelines
- Expertise in Position Data template 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)** Position Approval

**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 – Position Requests

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Pre-work</th>
<th>Initiator</th>
<th>Approver 1</th>
<th>UCPath Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Position A</td>
<td></td>
<td>Dept. Manager</td>
<td>HR Manager</td>
<td></td>
</tr>
<tr>
<td>Staff Position B</td>
<td>Dept. Manager</td>
<td>HR Admin/Gen</td>
<td>HR Manager</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HR Manager</td>
<td>Division Manager</td>
<td></td>
</tr>
<tr>
<td>Non-Senate Position</td>
<td>PI</td>
<td>AP Admin/Gen</td>
<td>AP Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>AP Manager</td>
<td>Dept. Dean</td>
<td></td>
</tr>
<tr>
<td>Senate Faculty Position</td>
<td>FTE Call Senate Review</td>
<td>AP Admin/Gen AP Manager</td>
<td>Central Budget</td>
<td></td>
</tr>
</tbody>
</table>
Position Funding Process
Future State Discovery Overview
3/13-14/18
New Position Funding Process Overview

- Funding no longer tied to Job Data; connected to the Position.
- Create/change funding at the position, position pool, or department level.
- Enter/update funding using the **Funding Entry** template in HCM Commitment Accounting.
- Departments with active employees will need to identify a default chartstring.
- Funding can be defined for a filled or vacant position.
- Position pool level funding where groups of positions share funding will be used for Work Study programs and where appropriate other types of positions.
- Use Worksheet template for an incumbent with multiple components of pay and/or with capped salary.
Funding Entry Process Flow

Initiator completes appropriate Funding Template

Funding Entry

Salary Cap/MCOP Worksheet

Funding Spreadsheet

Approver reviews and approves Template
Submits to UCPC

Approver reviews and approves Spreadsheet
Submits to UCPC

Transaction is saved to UCPath

UC Berkeley Campus

UCPath Center

UCPC processes Template
Your request for a Funding Entry transaction for Department 802200 has been approved at all levels, and has been processed into the PeopleSoft database.

You can view this transaction at
https://sucs4j.universityofcalifornia.edu/psp/SUCS4J/EMPLOYEE/HRMS/c/UC_EXTENSIONS,UC_DEPTBDGT_ERN.GBL?
Page=UC_DEPTBDGT_ERN&Action=U&REQUEST_ID=FE00002106&SETID=UCOP1&DEPTID=802200&FISCAL_YEAR=2018

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.
Transaction Denied

For a Denied transaction, use Copy to new transaction

Request ID: FE00002029, Set ID: UCOP1, Dept ID: 808800, Year: 2018: Denied
Position Funding – Create and Approval

**UCB Initiator Role**

**Template(s) Funding Entry (new or changes to funding)**

**Knowledge/Skills**

- Understanding of applicable policies, procedures and processes to Position Funding
- 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) Funding Entry**

**Knowledge/Skills**

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

<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>A</td>
<td>--</td>
<td>RA/FA</td>
<td>SR FA/FA Manager</td>
<td>N/A</td>
</tr>
<tr>
<td>B</td>
<td>PI/FA</td>
<td>RA/Admin</td>
<td>SR FA/FA Manager</td>
<td>N/A</td>
</tr>
<tr>
<td>C</td>
<td>RA/FA</td>
<td>FA Manager</td>
<td>SR FA Manager</td>
<td>N/A</td>
</tr>
</tbody>
</table>
TAM
Future State Discovery Overview
3/13-14/18
TAM Overview

- TAM is our staff recruitment system.

- There are several steps to complete before a posting is entered into TAM:
  - If the role is new or substantially changed: a Job Description, PEM, Org chart need to be filled out & submitted to central HR to be classified and approved.
  - A Position Control form needs to be filled out.
  - Salary rates need to be consulted and analysis done to select an equitable salary range.
  - A Position number needs to be identified or created.

- A TAM initiator must have technical & procedural understanding since recruitment activities are handled directly in the system and incorrect listings could increase the number of recruitment related lawsuits.

- Note: There are no UCPATH templates or self-service functionality, jobs are posted directly into TAM.
TAM Workflow in UCPATH

1. Creates Job Posting
   - Recruiter
   - Job Posting

2. Approves Job Posting
   - Approver(s)
   - Job Posting

3. Manages Recruitment
   - Recruiter
   - Interviews
   - Offer

4. Approves Offer
   - Approver
   - Offer Letter

5. Finalizes Recruitment
   - Recruiter
   - Prepare for Hire

Note: All entry is in UCPath TAM component – no templates
Create Job Opening part 1 (UCR mockup)
Create Job Opening part 2 (UCR mockup)
Create Job Opening part 3 (UCR mockup)

**Locations**

<table>
<thead>
<tr>
<th>Location</th>
<th>Location Description</th>
<th>Primary Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>P5523</td>
<td>SPROUL</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Recruiting Locations**

<table>
<thead>
<tr>
<th>Recruiting Area</th>
<th>Recruitment Area Description</th>
<th>Primary Recruiting Area</th>
<th>Target Openings</th>
</tr>
</thead>
<tbody>
<tr>
<td>5026</td>
<td>Main Campus - UCR</td>
<td>✓</td>
<td>1</td>
</tr>
</tbody>
</table>

**Positions**

<table>
<thead>
<tr>
<th>Position</th>
<th>Position Number</th>
<th>Primary Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Resource Manager</td>
<td>40002258</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Employees Being Replaced**

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
</tr>
</thead>
</table>
There are no current Affirmative Action goals for this Job Group.
Create Job Opening part 5  (UCR mockup)
Create Job Opening part 6 (UCR mockup)
Manage Applicants (Recruiter view)

- **Note**: sample UCR mockup.

### Manage Job Opening

- **Job Opening ID**: 994518
- **Job Posting Title**: Analyst
- **Job Code**: 001733 (HS ASSOC CLIN PROF-HCONMP)
- **Position Number**: 40102365 (PMO Test - pm 40102302 issue)

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Application Status</th>
<th>Applicant Name</th>
<th>Applicant ID</th>
<th>Type</th>
<th>Disposition</th>
<th>Disposition Reason</th>
<th>Application Date</th>
<th>Application</th>
<th>Resume</th>
<th>Interest</th>
<th>Mark Reviewed</th>
<th>Route</th>
<th>Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>James Bond</td>
<td>600354</td>
<td>External</td>
<td>Accepted</td>
<td></td>
<td>02/20/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>Timothy Cimuzali</td>
<td>6003202</td>
<td>Employee</td>
<td>Accepted</td>
<td></td>
<td>10/10/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>Luna Julia</td>
<td>6002289</td>
<td>External</td>
<td>Offer</td>
<td></td>
<td>10/10/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>Mohan Kris</td>
<td>600266</td>
<td>External</td>
<td>Offer</td>
<td></td>
<td>10/10/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>Russell Pat</td>
<td>600289</td>
<td>External</td>
<td>Offer</td>
<td></td>
<td>10/22/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete</td>
<td>Upload</td>
<td>Zsazane Schefler</td>
<td>600301</td>
<td>External</td>
<td>Offer</td>
<td></td>
<td>10/10/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Interview Evaluation (UCR mockup)
# Interview Summary  (UCR mockup)

Applicant Name: John  
Applicant ID: 60029  
Job Posting Title: Analyst  
Job Code: 001733 (HS ASSOC CLIN PROF-HCOMP)

<table>
<thead>
<tr>
<th>Select</th>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Time Zone</th>
<th>Location</th>
<th>Submitted</th>
<th>Status</th>
<th>Final Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>02/26/2018</td>
<td>9:00AM</td>
<td>11:00AM</td>
<td>PST</td>
<td></td>
<td></td>
<td>Unconfirmed</td>
<td>005 Interview</td>
</tr>
</tbody>
</table>

Interview Details:
- Date: 02/26/2018  
- Start Time: 9:00AM PST  
- End Time: 11:00AM PST  
- Location:  
- Submitted: Yes  
- Status: Unconfirmed

**Final Recommendation**
- Final Recommendation: 005 Interview  
- Reason:  
- Average Score: 8

**Interview Evaluations**

<table>
<thead>
<tr>
<th>Name</th>
<th>Interview Rating</th>
<th>Interview Type</th>
<th>Recommendation</th>
<th>Score</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jacqueline Nguyen</td>
<td>Excellent</td>
<td>Campus</td>
<td>020 Make Offer</td>
<td>8.000</td>
<td>Edit Evaluation</td>
</tr>
</tbody>
</table>

Create New Evaluation

Create New interview Schedule
Prepare for Hire template  (UCR mockup)

To initiate a hire, rehire, transfer, additional job assignment, or to add a contingent worker assignment, select Submit Request to HR.

<table>
<thead>
<tr>
<th>Applicant ID</th>
<th>600354</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant Name</td>
<td>James Bond</td>
</tr>
<tr>
<td>Current Disposition</td>
<td>071 Offer Accepted</td>
</tr>
<tr>
<td>Disposition Date</td>
<td>02/22/2019</td>
</tr>
<tr>
<td>Applicant Type</td>
<td>External - New</td>
</tr>
<tr>
<td>Application Date</td>
<td>02/20/2018</td>
</tr>
<tr>
<td>Job Opening ID</td>
<td>994518</td>
</tr>
<tr>
<td>Job Opening Type</td>
<td>Standard Requisition</td>
</tr>
<tr>
<td>Business Unit</td>
<td>UC Riverside Campus</td>
</tr>
<tr>
<td>Department</td>
<td>Dept. of Family Medicine</td>
</tr>
<tr>
<td>Position Number</td>
<td>40102365</td>
</tr>
<tr>
<td>Job Code</td>
<td>001733</td>
</tr>
<tr>
<td>Employee Class</td>
<td>Staff: Floater</td>
</tr>
<tr>
<td>SSN</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Probation Code</td>
<td></td>
</tr>
<tr>
<td>Probation End Date</td>
<td></td>
</tr>
<tr>
<td>Trial Employment End Date</td>
<td></td>
</tr>
<tr>
<td>ERIT/Phased Retirement End Date</td>
<td></td>
</tr>
<tr>
<td>Location Use End Date</td>
<td></td>
</tr>
<tr>
<td>PY Career Duration</td>
<td></td>
</tr>
<tr>
<td>Location Use End Date</td>
<td></td>
</tr>
</tbody>
</table>

PMO Test - psn 40102302 issue
HS ASSOC CLIN PROF-HCOMP
TAM roles and responsibilities

**UCB Initiator Role**

**Knowledge/Skills**

- Applicable policies, procedures, & processes related to Recruitment, including:
  - Classification & Compensation policy and procedures
  - Expertise in recruiting policy & procedures
  - Standard and appropriate language for job postings.
  - Understanding legal compliance (federal & state laws)
  - Experience sourcing qualified & diverse pool of applicants.
  - Familiarity with the effectiveness of various job sites for different job families.
  - Ability to analyze and propose/advise on equitable salary offers.

- Attention to accuracy and detail (identify and enter correct and appropriate info)
- Proficiency in PeopleSoft navigation, data entry, and business rules

**UCB Approver Role**

**Knowledge/Skills**

- High-level comprehension of organizational and financial impact of transaction
- Understanding of duty and accountability
- Commitment to thorough review and response
- Knowledge of applicable policies, procedures & processes related to recruitment
## Sample Scenario – TAM staff recruitment

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Pre-work</th>
<th>Initiator</th>
<th>Approver 1</th>
<th>Approver 2</th>
<th>UCPATH Center</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Supervisor and/or HR</td>
<td>Recruiter</td>
<td>Department (Financial Approval)</td>
<td>Recruit Manager</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Workforce Administration
HR Templates
Future State Discovery Overview
3/13-14/18
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 records

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

- Full Hire – Staff
- Full Hire – Academic
- Rehire – Staff
- Rehire – Academic
- Concurrent Hire – Staff
- Concurrent Hire – Academic
- Intra-Business Unit Transfer – Staff
- Intra-Business Unit Transfer – Academic
- Voluntary Termination
- Involuntary Termination
- Personal Data
- Retirement
- Prepare for Hire
- Add CWR
- Add CWR w/ Position
- Extend CWR Appointment
- Extend CWR w/Position
- Complete CWR
- Renew CWR
- Renew CWR w/Position
UCB Initiator completes HR Template

- Hire
- Rehire
- Personal Data
- Transfer
- Add Concurrent Job
- Termination
- Add / Renew CWR
- TAM
- Prepare for Hire

Inter-location Transfers

- Receiving Location
- Hire
- Releasing Location
- Termination

Workflow:

UCB approves HR Template
Submits to UCPath Center

Transaction is saved to UCPath Center

UC Berkeley

UCPPath Center
Hires & Rehires

- UCPC verifies information is complete, performs Search Match, and processes template data into Person, Job and associated records.
- When record is saved and employee ID is generated, UCPC assigns a New Hire Checklist.
- UCPC expects State Oath and Patent Acknowledgement to be signed, and signature dates to be included in template, if Hire/Rehire date has passed.
- UCB must complete onboarding, verify required documents including I-9, and update New Hire checklist within appropriate timeframe.
- Supporting documents can be attached to template (e.g., UFIN), but New Hire paperwork and personnel file stays at UCB.
- Former employees with break in service before conversion cutoff will have no record in UCPath – must be processed as a New Hire.
Auto-Termination of Jobs with End Dates

UCPath takes a **proactive** approach to terminating job records with End Dates:

- **End Job Automatically**
  - Staff jobs are defaulted to “End Job Automatically” by Employee Class: Contract, Limited, Student, Floater, Rehired Retiree, Per Diem
  - 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
UCPath provides several reports for monitoring End Dates:

<table>
<thead>
<tr>
<th>Reporting Tools</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs with Approaching End Dates Report</td>
<td>Identifies job records with End Dates 30/60 calendar days out from date report is run.</td>
</tr>
<tr>
<td>Job Record End Date Audit Report</td>
<td>Identifies job records with Employee Classes (staff) and Job Codes (academic) that should have End Dates, but do not. UCPath Center will work with UCB to ensure job records requiring end dates have them correctly entered into UCPath.</td>
</tr>
<tr>
<td>Escalation of Approaching Job Record End Date Report</td>
<td>Identifies job records with End Dates 10 calendar days out from date report is run, to facilitate UCB taking action on any remaining records before auto-termination process runs. UCPath Center plans to distribute this report to UCB-identified central HR/APO offices.</td>
</tr>
</tbody>
</table>
Mass Hire Batch Upload Process

- Intended for Hires of 50 or more
- Can be used for Hires and Concurrent Jobs, but cannot be used for any records requiring creating of JED or Additional Pay at time of Hire
- UCPath Center will upload a template completed by UCB and placed on file server; custom nightly batch process will load files with Person and Job Data
- UCPath Center will review and address errors in staging table before loading; errors that cannot be resolved by UCPath Center will be referred back to UCB
- Does not have workflow
- One template with Position Data, one without Position data
- New Hire checklist will automatically be assigned
Prepare for Hire (TAM Recruitments)

- Custom HR Template used by campus when completing a recruitment processed in TAM
- Includes all information needed for Hire, Rehire, Transfer or Add Concurrent Job transactions
- Prepare for Hire step sets off campus review and approval workflow and then submits to UCPath Center for final processing
- UCPath Center uses Manage Hires component to complete Hire, Rehire, Transfer or Add Concurrent Job transaction
Inter-Location “Transfers”

- Defined as when an employee leaves one UC location to take a new job at another UC location with no break in service.
- Processed as Hire – Termination so both locations retain access to their respective records:
  - Receiving location: Action/Reason ‘Hire/Transfer-Inter-location BU’
  - Releasing location: Action/Reason ‘Termination/Inter-location BU’
- Locations are expected to coordinate with each other for related processes, transfer of documentation, UFIN, etc.
Terminations

- Termination template must be submitted for each job record to be terminated (exception is Retirement, where UCPath Center will verify and terminate all jobs)
- UCB will assign and update appropriate separation checklist
- UCB is responsible for managing and maintaining separation packets including UI form and Termination Benefits checklist
- UCB will retain 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
- Related Benefits and Payroll follow-up processes are covered in separate business process design documents and flowcharts (e.g., Death Pay, Final Pay)
Personal Data Changes

- Administrators use Personal Data HR Template to update Personal Data on employee’s behalf
  - Uses approval workflow

- Employees may update their own Personal Data using Self-Service functionality
  - Access is through custom UCPath portal
  - Approval and follow-up documents are required for changes to Name, Gender
UCPath Personal Data and Job Data Pages

- Biographical Details
- Contact Information
- Regional
- UC Person Data

Job Data

- Work Location
- Job Information
- Job Labor
- Payroll
- Salary Plan
- Compensation
- UC Job Data
- Employment Data
- Earnings Distribution
- Benefits Program Participation

UCB will have VIEW ONLY access
HR Templates Request and Approval (New / Vacant)

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
# Sample Approval Scenarios – HR Templates

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Pre-work</th>
<th>Initiator</th>
<th>Approver 1</th>
<th>UCPath Center</th>
</tr>
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<tbody>
<tr>
<td>A</td>
<td></td>
<td>Dept. Manager</td>
<td>HR Manager</td>
<td>WFA Production Team</td>
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<td>PI</td>
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