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
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
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
Workforce Administration
PayPath - Position & Job Data Changes
Future State Discovery Overview
3/13-14/18
PayPath Overview

- Custom-built component with tabs for updating Position, Job and Additional Pay in a single transaction with a variety of Action/Reasons
- Requires position to be single headcount for updating Position data
- Also has mass spreadsheet processing and upload capability

### Sample PayPath Data Changes

<table>
<thead>
<tr>
<th>Position</th>
<th>Job</th>
<th>Additional Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLSA</td>
<td>Job Earnings Distribution</td>
<td>Stipend</td>
</tr>
<tr>
<td>Position FTE</td>
<td>Pay Rate Change</td>
<td>Incentive Award</td>
</tr>
<tr>
<td>Job FTE Override</td>
<td>Short Work Break</td>
<td>Honorarium</td>
</tr>
<tr>
<td>ERC</td>
<td>Data Change</td>
<td>Housing Allowance</td>
</tr>
<tr>
<td>Promotion</td>
<td>Percent Time</td>
<td>Perquisite</td>
</tr>
<tr>
<td>Reports To</td>
<td>Appointment Extension</td>
<td>Relocation</td>
</tr>
<tr>
<td></td>
<td>SWB Extension</td>
<td></td>
</tr>
</tbody>
</table>
PayPath Business Process

Filled Position, Job and Additional Pay Updates

UCB Initiator enters data into PayPath

Workflow

UCB approves update

PayPath Approval

Position / Job / Additional Pay update is made in UCPath

Note: Updates to vacant positions are performed using Position Control Form (workflow) or Position Data
## Short Work Break (SWB)

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

<table>
<thead>
<tr>
<th>Class</th>
<th>Type</th>
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</thead>
<tbody>
<tr>
<td>Staff</td>
<td>Partial-Year Career Furlough</td>
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<tr>
<td></td>
<td>Floater</td>
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<tr>
<td></td>
<td>Limited</td>
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<tr>
<td></td>
<td>Undergraduate Students</td>
</tr>
<tr>
<td>Academic</td>
<td>Academic Students</td>
</tr>
<tr>
<td></td>
<td>Unit 18- Benefits Bridge Eligible</td>
</tr>
<tr>
<td></td>
<td>Unit 18- Benefits Bridge Not Eligible</td>
</tr>
<tr>
<td></td>
<td>University Extension (UNEX)</td>
</tr>
<tr>
<td></td>
<td>Variable Appointment</td>
</tr>
<tr>
<td></td>
<td>Research Funding Bridge</td>
</tr>
</tbody>
</table>

- 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

Break period takes place within appointment dates – Set, or extend, appointment end date to cover work break period.
# 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>
# Short Work Break – Academic Types & Criteria

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Students</strong></td>
<td>Used to put academic students off pay status over the summer or in between quarters/semesters.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Unit 18- Benefits Bridge Eligible</strong></td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Unit 18- Benefits Bridge Not Eligible</strong></td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>University Extension (UNEX)</strong></td>
<td>Used to put a UNEX Teacher off pay status in between periods of active employment.</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Variable Appointment</strong></td>
<td>Used to put an exempt academic employee with a highly variable schedule off pay status in between periods of active employment.</td>
<td>Limited to 12 consecutive months. Used during periods of inactivity for exempt academic appointees with intermittent service (e.g. seasonal or on-call).</td>
</tr>
<tr>
<td><strong>Research Funding Bridge</strong></td>
<td>Used to put an employee awaiting research funding on SWB.</td>
<td>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.</td>
</tr>
</tbody>
</table>
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
<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>A</td>
<td></td>
<td>Dept. Manager</td>
<td>HR Manager</td>
<td></td>
</tr>
<tr>
<td>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>C</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>
</tbody>
</table>
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

UCPATH

UCPC processes Template

Transaction is saved to UCPATH

UCB Initiator

Request Extended Absence

Manage Accruals
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.
DEMO
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.
Additional Pay
Future State Discovery Overview
3/13-14/18
Additional Pay Overview

- Additional pay is any payment that is in addition to an employee’s regular base compensation.

- Additional Pay is separated into two forms: Recurring Additional Pay & One-Time Additional Pay.

- The Recurring Additional Pay form is used for transactions such as stipends and can be submitted as either a flat dollar amount or with a goal balance.

- The One-Time Additional Pay form should be used for transactions such as STAR awards/bonuses, moving expenses, and can only be submitted as a flat dollar amount.

- Recurring Additional Pay can have a different set of approvers than One-Time Additional Pay.

- BYA/BYN individuals will be input into the system as having zero base salary pay; their compensation will be paid using the additional pay forms.
Payroll: Additional Pay

- Berkeley Initiator completes appropriate HR Template
  - Recurring Additional Pay Form
  - One-Time Additional Pay Form

Workflow:
- Berkeley reviews and approves HR Template
- Submits to UCPC

Transaction is saved to UCPPath

UC Berkeley Campus

UCPath Center

UCPC processes Template
DEMO
Additional Pay and Approval

**UCB Initiator Role**

**Template(s):** One-Time Additional Pay, Recurring Additional Pay

**Knowledge/Skills**

- Knowledge of applicable policies, procedures, and processes related to additional pay
- Expertise in additional pay templates 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):** Approve One-Time Pay & Approve Additional Pay

**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 – Additional Pay

<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>A</td>
<td>--</td>
<td>Manager</td>
<td>RA/Financial Analyst</td>
<td>Template Processor</td>
</tr>
<tr>
<td>B</td>
<td>Manager</td>
<td>HR/AP Manager</td>
<td>RA/Financial Analyst</td>
<td>Template Processor</td>
</tr>
</tbody>
</table>
Off-Cycle Pay & Final Pay

Future State Discovery Overview

3/13-14/18
Off-Cycle/Final Pay Overview

- The Payroll Request form is used to request both off-cycle checks and final pay.
- Off-cycle check distribution defaults to an employee’s standard pay distribution (e.g., direct deposit, paper check).
- Separations are submitted using two forms: the Termination form, to request to end the employee’s job, and the Final Pay request, to pay out the employee’s remaining final pay and accruals.
- Checking the “Payout Accruals?” checkbox on the Final Pay form automatically calculates the employees accruals for their final paycheck.
- No information needs to be entered into the “Leaves” tab unless accruals need to be adjusted for the current pay period.
Payroll: Payroll Request (Final Pay & Off-Cycle Pay)

- Berkeley Initiator completes Payroll Request template
- Payroll Request (used for both Final Pay and Off-Cycle Pay)
- Berkeley reviews and approves Payroll Request Template
- Submits to UCPC
- Transaction is saved to UCPath
DEMO
Off-Cycle/Final Pay and Approval

**UCB Initiator Role**

**Template(s):** Payroll Request

**Knowledge/Skills**

- Knowledge of applicable policies, procedures, and processes related to off-cycle checks, rush checks, and final pay
- Expertise in additional pay templates 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):** Approve Payroll Request

**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 – Off-Cycle/Final Pay

<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>A</td>
<td>--</td>
<td>Manager</td>
<td>Payroll Manager</td>
<td>Template Processor</td>
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<tr>
<td>B</td>
<td>Manage</td>
<td>HR/AP Manager</td>
<td>Payroll Manager</td>
<td>Template Processor</td>
</tr>
</tbody>
</table>
Direct Retro (PETs)
Future State Discovery Overview
3/13-14/18
Direct Retro Process Overview

- Replaces Payroll Expense Transfers in PPS
- Process to move expense. Some examples below:
  - Move cost from one fund to another or multiple funds
  - Move cost to the appropriate fund to clear the ‘suspense’ account
  - Move cost to the appropriate fund to clear the ‘default’ account that was valid at the time of entry but is now invalid.
- After final location approval, the transaction is processed in the Nightly Batch
- Changes/updates are allowed after the Nightly Batch process.
- Direct Retro transaction considered high risk requires an additional approval level (e.g. Federal or Flow-through Fund (FFT), more than 120 days from original transaction)
Direct Retro Process Flow

Initiator completes appropriate Template

Direct Retro

Approver reviews and approves Template Submits to UCPC

UC Berkeley Campus

UCPC Batch Process

Transaction is saved to UCPATH

UCPATH Center
Your transaction for has been approved and submitted to UCPC to be processed into UCPath. As a reminder, it is effective as of 811100.

You can view this transaction at
https://sucs4j.universityofcalifornia.edu/psp/SUCS4J/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_HP_RDIST_REVIEW.GBL?
Page=UC RETRO DisterNS&Action=U&HP RUN_CNTL_ID=DR0000000742&OPRID LAST UPDT=&CREATION DT=2017-08-01&PAY DT=2017-05-06&HP TRANSACTION SRC=R

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.
Direct Retro Change and Approval

**UCB Initiator Role**

**Template(s)** Direct Retro (changes to funding)

**Knowledge/Skills**

- Understanding of applicable policies, procedures and processes to Direct Retro
- Solid background in funding constructs, e.g., chartstring, cap type, cap rate
- 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)** Direct Retro

**Knowledge/Skills**

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

### Sample Workflow Path

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Pre-Work</th>
<th>Initiator</th>
<th>Approver</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>*Controller</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>*Controller</td>
<td>N/A</td>
</tr>
<tr>
<td>C</td>
<td>RA/FA</td>
<td>FA Manager</td>
<td>SR FA Manager</td>
<td>*Controller</td>
<td>N/A</td>
</tr>
</tbody>
</table>
UCPath – UC Berkeley
Future State Business Process Discovery & Design
03/15/2018
Local Business Process Design – Meetings

- Project overview
- Confirm SME participation
- Review one transaction
- Preview for Sessions 2 & 3

Session #1
March 8
- Cross-Functional Discovery
- Demo transactions and workflow
- Preview one transaction
- Preview potential approval scenarios

Session #2
March 13
- Cross-Functional Discovery
- Demo transactions and workflow
- Preview potential approval scenarios

Session #3
March 14
- Q&A from Sessions 2 & 3
- Preview Deep Dive Series

Session #4
March 21
- Deep Dives by transaction area
- Deep Dives by transaction area

Deep Dive Series #1
March 26 – May 11
- Deep Dives by transaction area

Deep Dive Series #2
May 14 – July 27
- Deep Dives by transaction area

Attendees: Central HR, APO, Controller's Office, CAO, Department HR, & CSS/ERSO
March 21 Recap and Deep Dive Sessions

Goal

- Recap of March 13 & 14 sessions. Q&A
- Preview deep dive session calendar
- Discuss process for deep dive sessions
# Local Business Process Design – Meetings

## APR 2018

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<th>MON</th>
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<td>GL: FundingEntry</td>
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</tr>
</tbody>
</table>

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**Berkeley** | **UCPath**
UCPath Communication Cheat Sheet

What You Need to KNOW
1. UC Berkeley is working on configuration templates for conversion: **April 15 2018**
2. UCPath is not just a “technology project” - UC Berkeley will still own most of the business processes that feed into the UCPath workflow, so this is an opportunity to improve some of our processes
3. Starting in March, we will be discussing UC Berkeley’s business processes in preparation for UCPath go-live. The kick-off is scheduled for **March 8th 2018**
4. UC Berkeley website launched. Link [https://ucpath.berkeley.edu/](https://ucpath.berkeley.edu/)

What You Need to DO
1. Start talking about UCPath in your staff meetings (if you haven’t already) – use the Communication cheat sheet we will provide each month
2. Help identify SME’s who will participate in 2 day session(March 13th & 14th) followed by deep dive sessions by business area from March 26th to July 27th

What You Need to COMMUNICATE
1. UCPath Go-Live date is currently scheduled for: **March 2019**
2. UCPath is a mandatory change initiative for all UC’s therefore participate in local business process discovery and design sessions to ensure roles and responsibilities are defined and ready for training and testing
3. If you have any questions regarding UCPath please contact us at [ucpathtechinfo@lists.berkeley.edu](mailto:ucpathtechinfo@lists.berkeley.edu)

March 2018

**For Help with Functional Questions:** UCPath
Functional Office Hours
Every Tuesday from 1 – 2PM (PST)
Telephone: (669) 900-6833 or (877) 369-0926 (Toll Free)
Meeting ID: 101 157 755

**For Help with Technical Questions:** UCPath
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Telephone: (669) 900-6833 or (877) 369-0926 (Toll Free)
Meeting ID: 857 981 295