



UCPath at UC Berkeley

Future State Discovery Overview

3/13-14/18

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

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



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

Position

- ☐ FLSA
- ☐ Position FTE
- ☐ Job FTE Override
- ☐ ERC
- ☐ Promotion
- ☐ Reports To

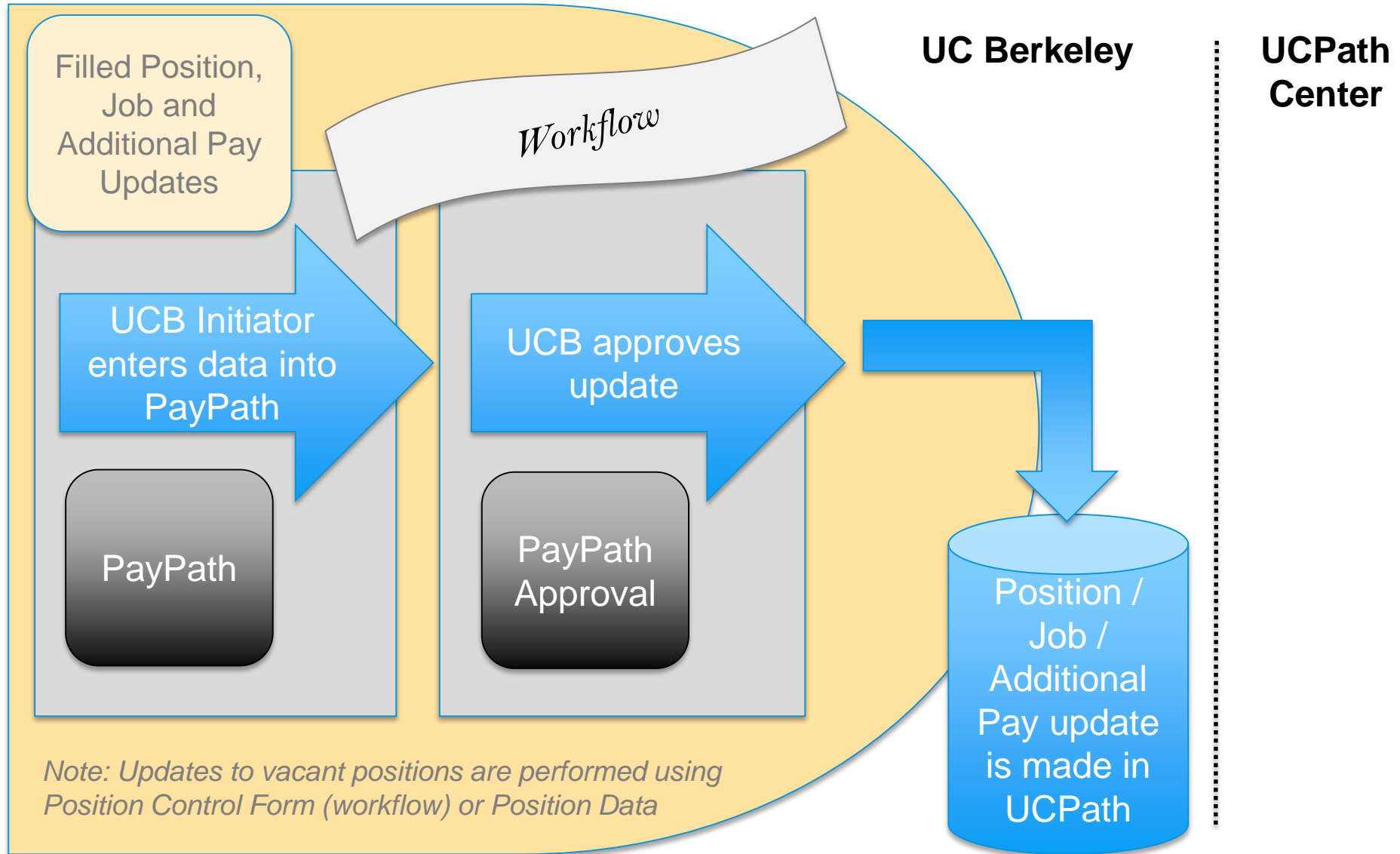
Job

- ☐ Job Earnings Distribution
- ☐ Pay Rate Change
- ☐ Short Work Break
- ☐ Data Change
 - ☐ Percent Time
 - ☐ Appointment Extension
 - ☐ SWB Extension

Additional Pay

- ☐ Stipend
- ☐ Incentive Award
- ☐ Honorarium
- ☐ Housing Allowance
- ☐ Perquisite
- ☐ Relocation

PayPath Business Process



Short Work Break (SWB)



- 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.
Floater	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.

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	



Leave Management

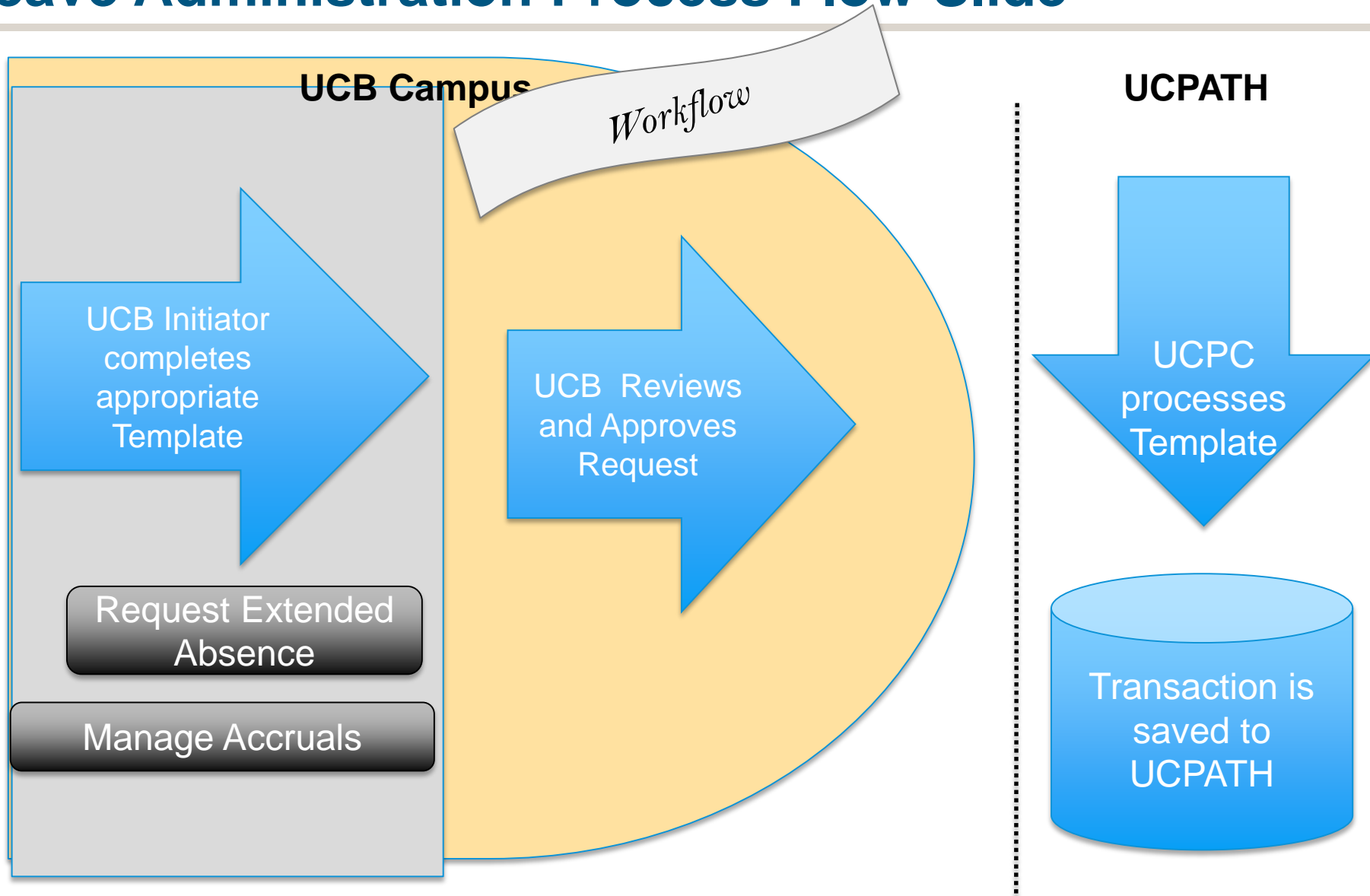
Future State Discovery Overview

3/13-14/18

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



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.

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.

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

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



Additional Pay

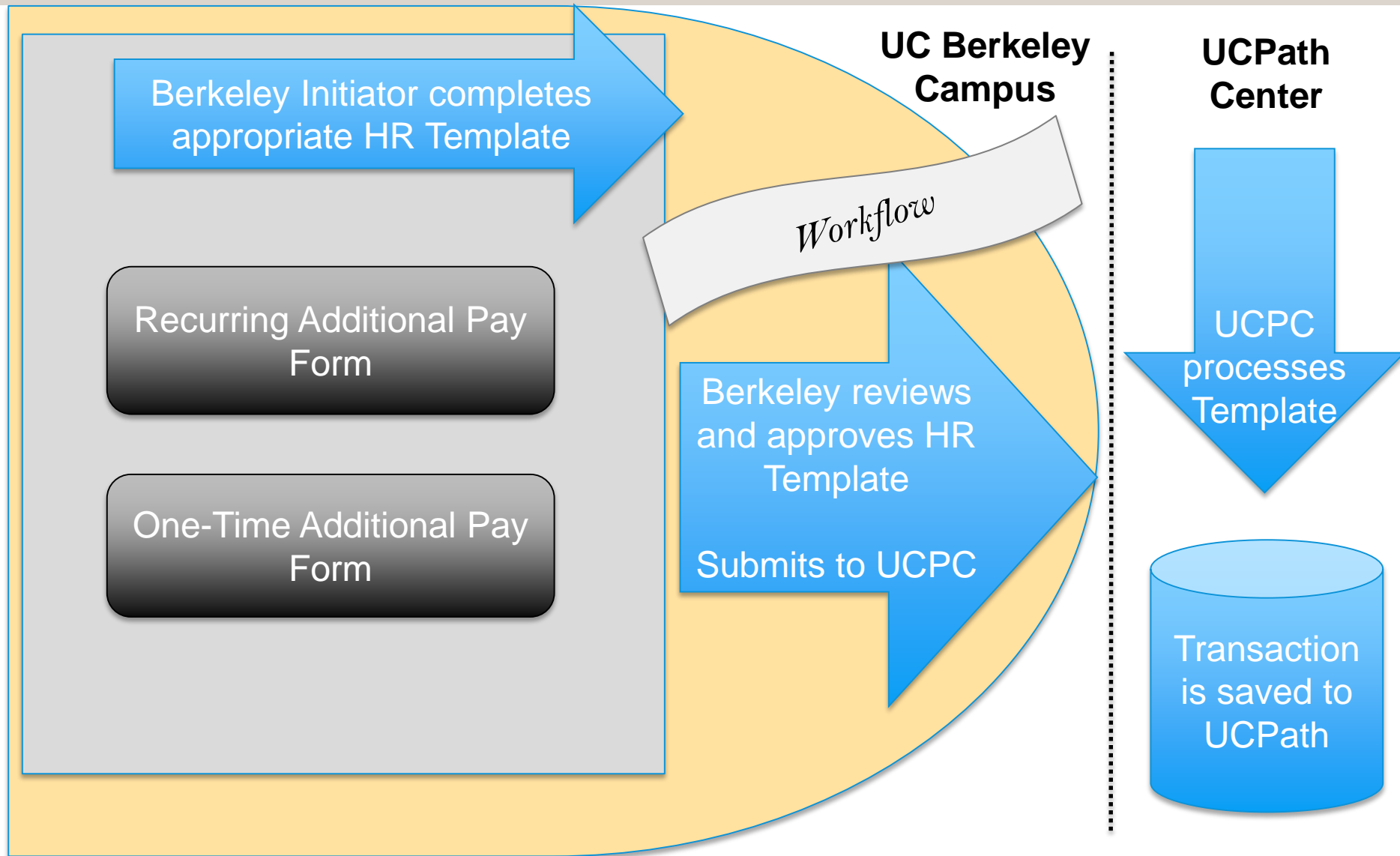
Future State Discovery Overview

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



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

Scenario	Pre-Work	Initiator	Approver 1	UCPath Center
A	--	Manager	RA/Financial Analyst	Template Processor
B	Manager	HR/AP Manager	RA/Financial Analyst	Template Processor



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.

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

Scenario	Pre-Work	Initiator	Approver 1	UCPath Center
A	--	Manager	Payroll Manager	Template Processor
B	Manage	HR/AP Manager	Payroll Manager	Template Processor



Direct Retro (PETs)

Future State Discovery Overview

3/13-14/18

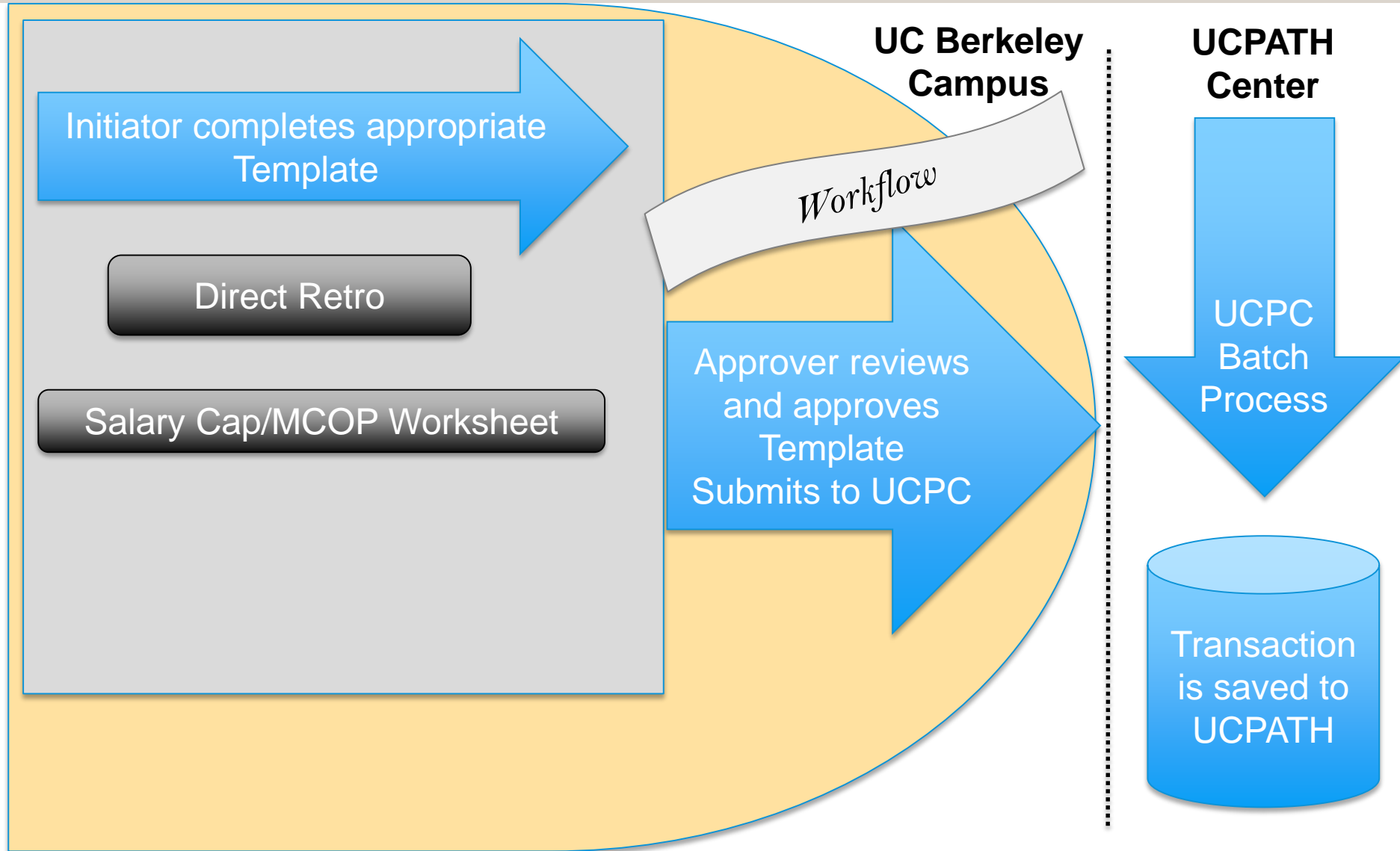
Direct Retro Process Overview

- 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)

NEW



Direct Retro Process Flow



DEMO

Direct Retro – Approval Notification

From: [REDACTED]
To: [REDACTED]
Cc:
Subject: transaction approved

Sent: Tue 8/1/2017 1:10 AM

Your transaction for [REDACTED] 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=DR00000000742&OPRID=\[REDACTED\]&LAST_UPDT=\[REDACTED\]&CREATION_DT=2017-08-01&PAY_DT=2017-05-06&HP_TRANSACTION_SRC=R](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=DR00000000742&OPRID=[REDACTED]&LAST_UPDT=[REDACTED]&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

Scenario	Pre-Work	Initiator	Approver	Approver	UCPath Center
A	--	RA/FA	SR FA/FA Manager	*Controller	N/A
B	PI/FA	RA/Admin	SR FA/FA Manager	*Controller	N/A
C	RA/FA	FA Manager	SR FA Manager	*Controller	N/A



UCPath – UC Berkeley

Future State Business Process Discovery & Design

03/15/2018

Local Business Process Design – Meetings



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

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Leave
Manage-
ment

Additional
Pay
Final / Off-
Cycle Pay

Direct
Retro

Local Business Process Design – Meetings

APR 2018

SUN	MON	TUE	WED	THU	FRI	SAT
01	02	03	04	05	06	07
	WFA:New Hire WFA:New Hire WFA:New Hire AM:Leave/wPay AM:Leave/wPay AM:Leave/wPay TAM TAM TAM					
08	09	10	11	12	13	14
	WFA:Transfer WFA:Transfer WFA:Transfer AM:Manageaccrual AM:Manageaccrual AM:Manageaccrual Final Pay Final Pay Final Pay					
15	16	17	18	19	20	21
	GL:FundingEntry GL:FundingEntry GL:FundingEntry AM:Leave/wPay AM:Leave/wPay AM:Leave/wPay PayRateChange PayRateChange PayRateChange					
22	23	24	25	26	27	28
	WFA:ShortWorkBreak WFA:ShortWorkBreak WFA:ShortWorkBreak AdditionalPay AdditionalPay AdditionalPay TAM TAM TAM					
29	30					

UCPath Communication Cheat Sheet



March 2018

For Help with Functional

Questions: UCPath

Functional Office Hours

Every Tuesday from 1 – 2PM (PST)

Telephone: [\(669\) 900-6833](tel:(669)900-6833) or [\(877\) 369-0926](tel:(877)369-0926)

(Toll Free)

Meeting ID: 101 157 755

For Help with Technical

Questions: UCPath

Technical Office Hours

Every Thursday from 1 – 2PM

(PST)

Telephone: [\(669\) 900-6833](tel:(669)900-6833) or [\(877\) 369-0926](tel:(877)369-0926)

(Toll Free)

Meeting ID: 857 981 295

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/>

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