UCPath – UCB

Deep Dive Sessions: Hire – Rehire – Concurrent Hire

April – May – June 2018
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
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
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
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
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
Hire – Concurrent Hire – Rehire Templates & Onboarding Processes
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.
UCB Initiator completes HR Template

UCB approves HR Template and submits to UCPath Center

UCB completes onboarding and documents

Transaction is saved to UCPath

UC Berkeley

UCPath Center

View Person Org Summary

Hire Rehire Concurrent Hire

Transfer (Intra-BU) Personal Data

Termination Retirement

Add / Renew / Complete CWR
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
Onboarding Documents & Signatures

- Onboarding documents and signatures remain a UCB responsibility
- Supporting documents can be attached to template (e.g., UFIN), but New Hire paperwork and personnel file stays at UCB
- UCPC expects State Oath and Patent Acknowledgement signature dates to be included in template, if Hire/Rehire date has passed
- UCB is in process of implementing Tracker tool for I-9 processing

### UC Berkeley HCM

- Oath, Patent, I-9 signature dates are required to save a record
- Onboarding documents must therefore be signed prior to entering data at end of process
- Audit and business processes have developed in alignment with those system requirements

### UCPath HCM

- Onboarding and signing of documents should be conducted accordingly to policy, statute and business process requirements
- Provides opportunity for adapting audit and business processes to ensure compliance and achieve efficiencies
Template Demos
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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