



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	<ul style="list-style-type: none">• Develop efficiency in end-to-end business process• Use UCPATH delivered functionality• Minimize additional cost• Eliminate double data entry
Diverse Campus Stakeholders	<ul style="list-style-type: none">• Involve both academics and staff (at multiple levels)• Maintain a customer focus
Disciplined Process	<ul style="list-style-type: none">• Ensure implementation focus• Use UCPATH delivered templates and approval workflow• Document decisions for clarity and commitment
Openness to Change	<ul style="list-style-type: none">• Maintain enterprise-wide perspective• Be open to process and role changes• Be transparent with communications

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

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

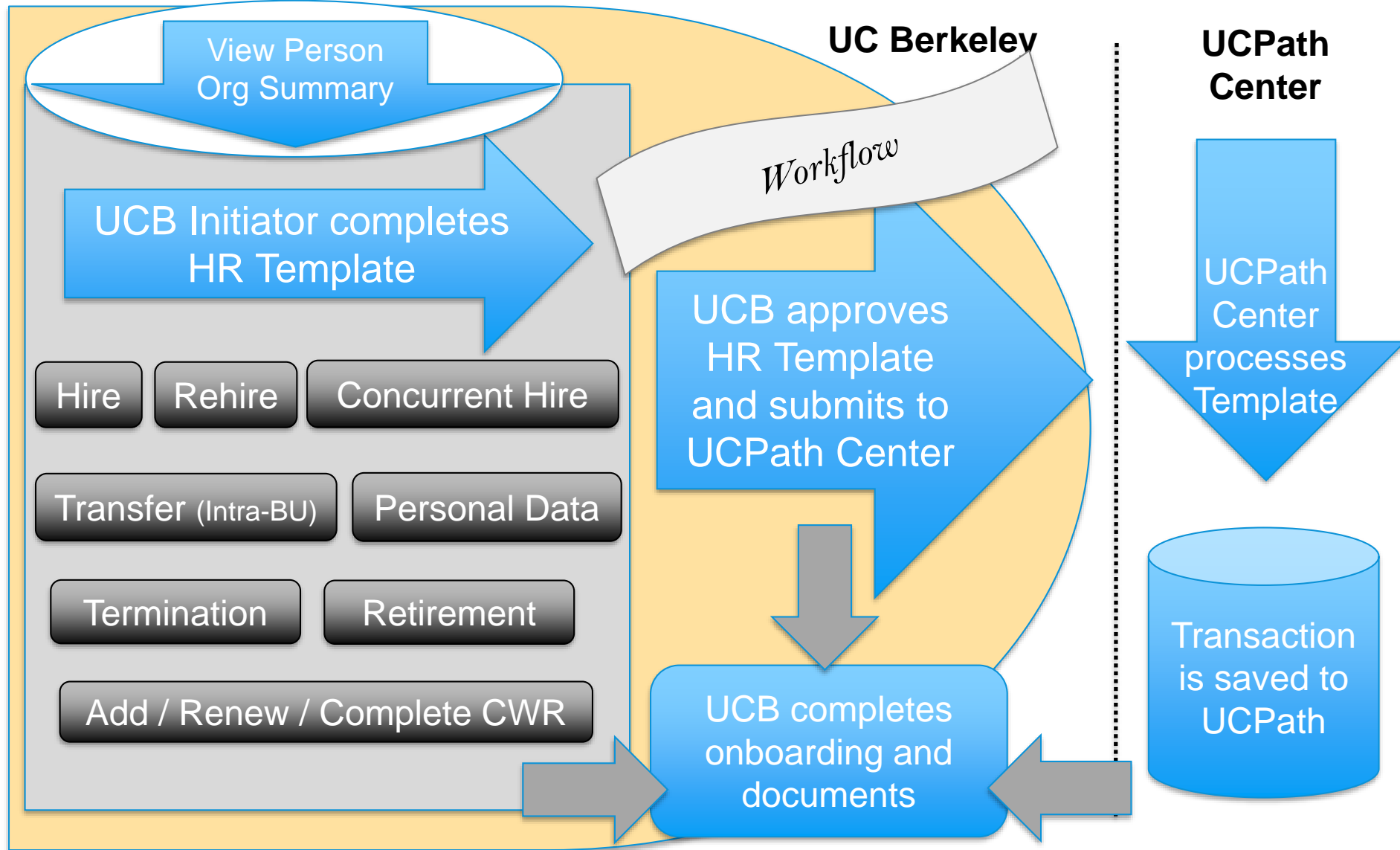
HR Templates Overview

- 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

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

HR Template Transaction Processing



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

Sample Approval Scenarios – HR Templates

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