

NAVIGATOR

OCTOBER 2018

UCR

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FOM | **UCPath**
FUTURE OPERATING MODEL | PAYROLL, ACADEMIC PERSONNEL, TIME KEEPING & HUMAN RESOURCES
Supporting Organizational Excellence

The Navigator is provided to UCR staff who have operational responsibilities in the areas of Human Resources, Academic Personnel, and Business & Financial Services to convey key information on the UCR FOM\UCPath project implementation.

MESSAGE FROM THE SPONSORS

Welcome to Fall Quarter! UCLA and UCSB have officially gone live with UCPath. The UCR project team is continuing to monitor this process, working to mitigate any impacts on UCR, and providing the campus community with crucial communications. Employees should continue to carefully monitor the November payroll, as this is the first one for UCLA and UCSB that would have been the full product of UCPath rather than just the transfer of data from the old system. We have had several issues with graduate student pay, however the project team has worked hard to ensure there are no further problems and we hope that their processing errors of the past are all behind us. However, if anyone is aware of any issues please email fomucpath@ucr.edu.

The project team is also continuing to develop a comprehensive review of the UCR FOM\UCPath implementation, process and structure. They are meeting with campus leadership for feedback on changes to improve the UCPath experience for the campus as well as evaluating all the processes that are currently in place. Moreover, there will also be a client survey in the near future to provide insight on the topics above.

As always, we appreciate your patience and understanding that, although we expect some issues, we are doing our best to make sure they are minimal. If you have questions or concerns during this transition period, academics can email UCPathHelp@ucr.edu, and staff can email fomucpath@ucr.edu.

FALL QUARTER NEW HIRES

Departments/Organizational Units/Shared Service Centers:

Due to a high volume of transactions resulting from the recent UCSB/UCLA go-live, the following interim steps should be taken:

- Departments and Organizational units should send forward Fall Quarter New Hires to your respective SSC well in advance of the cutoff date so that your new hire appointees are added to UCPath before the Pay cycle deadline.
- SSCs should utilize the pre-hire process and submit an HR template after receipt of the formal appointment letter, but prior to the in-person onboarding appointment.
- SSC AWE Approvers should take extra precaution when reviewing transactions to limit the possibility of UCPC cancellation and further delays.
- SSCs should use PayPath to check the End Job Automatically box whenever possible

JOB RECORD END DATE (JRED)/SHORT WORK BREAK UPDATE PROCESS

In Preparation for the start of Fall Quarter, Department/ORGS are asked to review their existing appointees with Expired JRED's and those on a SWB and submit the appropriate transaction(s) to your SSC. As of 10/1/18 UCR had 1920 jobs in UCPath with expired JRED's and 1464 jobs on a SWB. The large majority of these jobs are academic. Departments/ORGS are asked to utilize the Cognos report R-103 Jobs with Approaching End Dates, R-384 Escalation of Approaching Job Record End Dates and R-108 Short Work Break Monitoring to proactively review and send updates to their SSC for timely updates to UCPath.

JRED: To facilitate the process for the start of the quarter, a spreadsheet showing jobs with expired end dates be was sent to the appropriate SSC and Academic ORGS for further distribution down to ORG/Departments to review and determine one of the following job updates:

1. Appointment Extension
2. Eligible SWB
3. Termination

SWB: Jobs on a SWB that are active as of the fall quarter should be returned from SWB before Payroll cutoff of 10/19/18 and for ASE/GSR's by 10/10/18. Jobs on an eligible SWB for the Fall Quarter should have a valid future dated Return Date and future dated JRED. A spreadsheet showing jobs currently on a SWB was sent to the appropriate SSC and Academic ORGS for further distribution down to ORG/Department to review and determine one of following job updates:

1. Return to Active Pay Status
2. Termination
3. Eligible SWB Extension

Please send any questions about the Fall JRED/SWB Update Process to the AP UCPath Support Team

10/1/2018 ASE/GSR RANGE ADJUSTMENT

The Fall Academic Range Adjustment for GSR/ASE appointees is coordinated by the UCOP Academic Affairs Office and implemented by the UCPC in conjunction with the Academic Personnel Office/AP UCPath Team.

- The salary increase is effective 10/01/18 with a check date of 11/01/18 for monthly employees and effective 10/07/18 with a check date of 10/31/18 for biweekly employees.
- Existing employees with system-wide scale rates will be updated via the ATB range adjustment process by UCPC and the AP UCPath Team.
- New appointees effective 10/01/18 and after will have their new salary reflected in UCPath upon hire; new tables have been loaded in UCPath.
- Local tutor rates for Job Code 002861 are posted on the APO website and are in UCPath and should be entered in UCPath using the BYA Salary Plan.

TIMELINE:

- 10/01/18 - Spreadsheets of eligible appointees sent to ORGS and SSCs
- 10/10/18 - Deadline to bring back Fall GSR/ASE appointees from SWB and extend Job Record End Date (JRED)
- 10/11/18 - 10/14/18 - Freeze on transactions for impacted titles
- 10/12/18 - UCPC runs E-105 range adjustment process; AP UCPath team updates C 2861 via Paypath upload template
- 10/15/18 - Rosters with updated jobs sent to campus
- 10/19/18 - RA corrections are due for monthly employees
- 10/22/18 - RA corrections are due for biweekly employees
- 10/31/18 & 11/1/18 - Paycheck dates for BW and MO appointees

Please send any questions about the 10/1/ 2018 GSR/ASE range adjustment process to academicpersonnel@ucr.edu

SERVICELINK UPDATE

1. SHORT WORK-BREAK FORM (IN PRODUCTION)

- a. New Employee Solution – no longer a grid view but fields on the form (Employee ID, First Name, Last Name, Middle Name, Org, Department Code and Description, Initiator, Shared Services, Transaction Type).
- b. Bug fix: If Employee has two jobs and the Initiator is provisioned in the secondary job, the Initiator is now able to transact on the secondary job. No need to submit a Generic request, the employee information will display for the secondary job.

2. JOB & COMP DATA FORM (CURRENTLY IN DEVELOPMENT)

- a. New Employee Solution – no longer a grid view but fields on the form (Employee ID, First Name, Last Name, Middle Name, Org, Department Code and Description, Initiator, Shared Services, Transaction Type).
- b. Bug fix: If Employee has two jobs and the Initiator is provisioned in the secondary job, the Initiator is now able to transact on the secondary job. No need to submit a Generic request, the employee information will display for the secondary job.

TRACKER UPDATE

The UCR project team has been testing the Tracker-UCPath integration for the last week. During the testing several issues were identified, including the fact that data changes in UCPath were not triggering the appropriate actions on the Tracker dashboard. While there were still outstanding issues with the Tracker integration, UCPath Center felt it was imperative to move forward to the new process with UCLA & UCSB's go-live. The UCPath Center has also informed UCR that they can no longer support the historical I-9 process. This means that UCR has moved forward with a full Tracker implementation since Monday, October 1st. Keep in mind, that UCR has been using Tracker for the last 9 months for the historical I-9 process and has not encountered issues. The UCR Tracker project team is here to assist our users if they have questions or if they encounter any of the defects that were identified during testing. Users can email fomucpath@ucr.edu for any Tracker support they need. Updates will be provided on defects as we receive them.

TRAINING UPDATE

HRDW DATA DICTIONARY

A comprehensive HRDW Data Dictionary is now available to [download \(.xlsx\)](#).

The HRDW Data Dictionary provides the following information on queryable HRDW & UCPath data:

1. Provides all HRDW Query (Criteria) and Display fields
2. Maps HRDW fields to UCPath data
3. Provides comprehensive definitions to all data fields
4. Provides comprehensive data output options with full descriptions.

Additional information on the Data Dictionary, including step-by-step guidance on how to use the dictionary is available from this presentation slide deck (PDF).

SERVICELINK JOB AIDS

Numerous ServiceLink Job Aids have been created to better support Accountability Structure ServiceLink Initiators and Fulfillers. Job Aids are available to download from the [FOMIUCPath Training Resources webpage](#). New ServiceLink Job Aids cover the following processes:

- Position Data Management
- Onboarding (New Hire, Rehire, Transfers, Concurrent Hire, Person of Interest)
- Job Data Changes
- Compensation Data Changes
- Extended Leaves for Academics (Medical, Non-Medical, and Sabbatical Leaves)
- Extended Leaves for Staff (Medical and Non-Medical Leaves)
- Short Work Break
- Offboarding

UCPATH TRAINING COURSES UPDATES

Many UCPath Training courses and assets have been updated to reflect recent changes to the system. The following online courses have been revised and are now available from the [UC Learning Center](#). If you have already taken a previous version of the course, it is recommended that you take the new version of the course as significant changes have been made to the system and its functionality.

- [PHCMNAV310: AWE Overview and Approvals](#)
- [PHCMNAV320: AWE Administration](#)
- [PHCMWFAL270: PayPath Transactions](#)

UCPATH UPDATES

REMINDER: SECURITY VERIFICATION - UCPATH has launched a new feature to further protect and verify a user's identity. Users are now able to set up security questions and answers that will provide increased security to protect users from unauthorized access or changes to financial and personal information in UCPATH. UCPATH will prompt a user to verify their identity by randomly displaying one of the security questions when viewing/updating highly confidential/personal information. If you have any concerns or issues regarding the questions, academics can email UCPathHelp@ucr.edu, and staff can email fomucpath@ucr.edu for assistance.

TAM & EPER UPDATE

UCR'S IMPLEMENTATION OF TAM AND EPERFORMANCE - DATE EXTENDED

Talent Acquisition Manager (TAM) will replace UCR's current staff applicant tracking system, iRecruit and ePerformance (ePer) will replace UCR's current paper performance appraisal process.

UCR'S IMPLEMENTATION DATE EXTENDED

The implementation date for TAM and ePer has been extended from March 2019 to September 2019. Although the project was successfully moving towards the March 2019 implementation date, UCR leadership, along with the project sponsors, re-evaluated the timeline and the impact to the campus which has already undergone significant change with FOMIUCPATH. They concluded that delaying the deployment by six months could alleviate additional project and change fatigue and allow additional time to focus on UCPATH stabilization.

TAM AND EPER CURRENT ACTIVITIES

UCR has begun integration testing of TAM and ePer which runs through mid-December. The testing team consists of department supervisors and human resources staff who will work first hand with these systems. Testers developed and are executing recruiting and performance appraisal test scenarios and are providing important feedback on system functionality and navigation. TAM and ePerformance Workgroups, representative of campus departments and organizations, have been established and meet regularly to review system configuration and functionality; provide feedback and focus to guide the implementation; identify stakeholder concerns; and provide guidance on change management and engagement efforts. We are grateful to both the TAM/ePerformance testing team workgroups for participating in these critical implementation activities. For a list of members, please visit the [TAM webpage](#) and the [ePer webpage](#).