



UCR TO-BE PROCESS DESIGN

Business Process Design Person Of Interest

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I. Document Change Log

Use this table to summarize changes made to this document

Date	Editor	Summary of Changes
4/9/19	Alexandra Rollins	Draft 1
5/6/19	Alexandra Rollins	Final

II. Process Overview

This section defines the overall scope and boundaries of the To-Be process design.

Process Description

Single paragraph that provides the general description of the overall process—its start, its end, and its overall purpose.

Definition of Person of Interest (POI)

- The POI relationship is at the Business Unit level, and cannot be tied to a certain department or unit. There is a potential enhancement that will allow locations to assign a particular department to a POI for reporting purposes only.
- POI is created when there is a location need for a person that is not performing any duties or functions in the service of the location to exist in UCPath (for location access issues, system access, etc.).
- A POI is not an employee of the University; and will not receive compensation through UCPath.
- Does not have Position Data or Job Data in UCPath. POIs are assigned a Person ID, instead of an Employee ID.
- If a POI later becomes an employee or a Contingent Worker (CWR), then their assigned Person ID becomes their Employee ID.
- POI data will be sent to the location IDM systems.
- Types of POIs in UCPath include:

POI Type	Description
00012 UC/OP Affiliated Organization	Regents, Foundation, and Advisory Board Members and others who serve on UC advisory and review committees. May also be used for persons who are physically located at the business unit but are employed by a different business unit.



00013	Assoc. of President/Chancellor	Family members of a Chancellor or the President.
00014	Potential Hire - Academic	Tracking of Potential Academic Hires and is used at the discretion of the location such as: <ul style="list-style-type: none"> Used to add potential hires into the system ahead of offer being made. This is typically used for access provisioning for Academic and Executive recruiting. Allows locations to track candidates that are undergoing evaluation as to whether or not that location would hire them.
00016	External Compliance/Auditor	An employee of a federal, state or other regulatory body conducting an audit or other compliance review of UC, and with those agencies or persons in which there is a contract in place.
TBD	Potential Hire – Staff	Tracking of Potential Staff Hires and is used at the discretion of the location.

Design Authority

The following process owners and leads have decision making authority over the design of this process deliverable and must review the final deliverable prior to approval by the ABSSC Leadership Council.

Functional Owners

- Academic Personnel – *AVP Academic Personnel*
- Human Resources – *AVC Human Resources*

Functional Leads

- Academic Personnel – *AP Functional Lead*
- Human Resources – *HR Functional Lead*

Operating Model Phase 1

- This includes the roles and org structure for the future state
 - Roles
 - Transactional Unit
 - AP/HR Staff member as initiator
 - Shared Service Center
 - AWE Approver
 - UCPC
 - WFA Production
 - Business process mapping for this phase will include
 - Transactional Unit
 - Shared Service Center
 - UCPC



Policy

Academics

Link to Academic Policies and Guidelines (Nick)

Staff

No policy or local procedure for POI, link to Job Aid (by 6/15/19)

Assumptions & Decisions

This section describes the key assumptions and decisions made in relationship to this process design.

Description
1. All necessary location level approvals are in place and all necessary consultations, communications, policy and procedures have been followed.
2. The location has conducted a search match in UCPATH Person Org Summary to identify any existing job records or location affiliations, including contingent worker (CWR) and employee relationship types, prior to adding the POI.
3. The locations will monitor and manage the POI relationships, including inactivating them when they are no longer needed as a POI for their location.
4. Delivered AWE will be utilized for POI-related requests (UCPATH Center will not be receiving transactions)
5. UCPATH Center will be able to run the POI End Date report to validate locations are properly inactivating POI relationships that have an expired expected end date. (UCPATH-5580)
6. The POI Forms (and all associated fields) will be finalized as part of the overall 9.2 analysis. (UCPATH-5755)
7. When the situation dictates, POIs should be included within UCPATH rather than Locations entering them directly within a local IDM system.

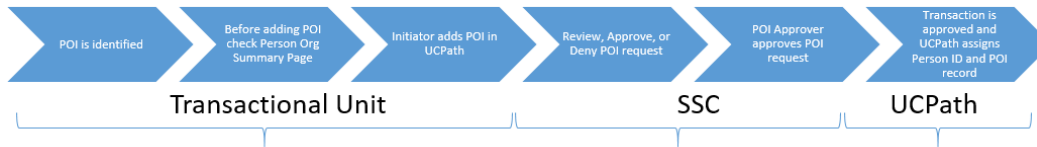
III. Process Design

Overall Process Sequence

The overall process sequence describes the major steps required to deliver the value of the process. It is the “Elevator Speech” to quickly and simply define its flow. This “Level 1” detail does not include the multiple variations.



Phase 1



Roles Description

The following are the roles required to successfully execute this process.

Role Name	Role Description
Transactional Unit	<ul style="list-style-type: none"> • Primary point of contact for managers and unit level leadership • Will identify the POI and determine if the person already exists in UCPATH; if the POI is not already in UCPATH; the transactional unit will add them to UCPATH as a POI
ORG Authority	<ul style="list-style-type: none"> • Responsible for ensuring the appropriate policy is followed.
Shared Services	<ul style="list-style-type: none"> • Responsible for approving transactional activities and client support • Reviews, approves, or Denies POI request and is responsible for notifying the Transactional Unit if their request was denied
UCPath Center	<ul style="list-style-type: none"> • Responsible for assigning Person ID and POI record

Inputs and Outputs

Inputs are the decisions, data, documents required to initiate the **overall** process. Owners are the “suppliers” of those inputs.

Outputs are the data, documentation, records, reports, or experiences that the **overall** process is supposed to produce over the course of its execution. Customers are the recipients of those outputs.

Input/output	Owner or Customer	Description
Input	Owner	Add/Maintain POI Relationship Form

Performance Metrics

What is the proposed or aspirational performance metrics desired to measure the efficacy of the **overall** process. These can be leveraged from the as-is process, influenced by the UCPATH processes or new metrics not currently measured.



Metric Type	Metric Description	Measurement Method
Duration	How long should it take to perform the overall process?	Cognos Report, internal SSC spreadsheets
Service	What is the desired level of customer satisfaction with the process?	Satisfaction Survey
Accuracy	What is the acceptable threshold for errors or re-work in the process?	Cognos Report, internal SSC spreadsheets
Efficiency	What time or financial resources are required to support the end-to-end process?	Cognos Report / Staffing Analysis

Process Context

Use this section to note clarifying information on steps in the mapped process (es) where needed to help explain reasoning behind changes to the as-is process. This is not a place to document a comprehensive listing of all activities related to each process step.

Process Name/Step	Context/Information	Is this a new step in the To-Be Process?
Step 2	Use the Add Person of Interest component if the person does not have a UCPath Person ID Use the Add a POI Relationship component if the person has an existing UCPath Person ID	No
Step 3	Initiator can add POI, Maintain POI Relationship and Add POI Relationship The approval workflow routing appears after the POI Initiator successfully submits the new person of interest	No
Step 6	The approval workflow also appears on the Worklist in UCPath A POI approver can approve a person of Interest from the worklist, the link in the AWE email, or from the Person of Interest Approval Page	No
Step 8	'UCPath assigns the Person ID and creates the POI record when the request is approved	No
Note	Note: Locations are responsible for adding and maintaining POI records in UCPath. POI records that create a Person ID in UCPath are approved using Automated Workflow Engine (AWE). POI instances added to existing Person IDs do not use AWE. UCPath Center does not add nor maintain POI records in UCPath. However, only UCPC can update a POI's address and phone number. Locations must create a case to have UCPC update this information	



IV. Detailed Design

With the exception of the parking lot, this section will be completed during the detailed design phase of the project

Local System Impacts/Needs

Placeholder for analysis of system needs, capabilities, gaps. Will leverage UCPath capability requirements and as-is process tools analysis as applicable

- EACS changes
- AWE changes
- ServiceLink changes
- Snapshot changes

Campus Change Impacts

Change impacts as a result of the optimized process design.

- The submission of template transaction for POI will be initiated by the Transactional Unit, which used to be done by the SSC. This means that the initiator will initiate the process, but SSC will be responsible for approving/validating via AWE for Phase 1 and Phase 2.
- Policy Guidelines
 - AP/HR is working on a matrix that outlines when to hire a CWR, POI and when to go through the Net ID affiliate process so proper campus guidelines are followed.
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V. Document Signoff

Use this table to list approvals for this document

Date	Approver	Status
05/08/2019	Heidie Rhodes	Approved - <i>Heidie Rhodes</i>
Mm/dd/yyyy		
Mm/dd/yyyy		

5/13/2019 Approved Antonette Toney

