



UCPath Update

ITS Town Hall | March 21, 2016

Agenda

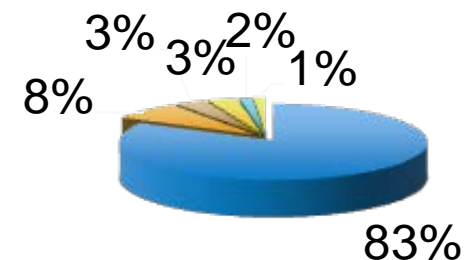


- UCPATH Center Status
- Pilot Deployment
 - 90 Day Successes
 - Pilot Focus Area
 - Pilot Timeline Development
- Remaining Deployments
- Q&A

UCPath Center: Trends November 2015

Nov. 2015			
	Category	Count	UCPC Response
#1	Benefits	1,096 Cases	Instantly able to send employees their personalized O.E. Link; Answer questions regarding different various medical/dental plans.
#2	Payroll	104 Cases	Walked employees through adding multiple banks/credit unions as direct deposit options.
#3	Employment	46 Cases	Improved the VOE response time for both written and verbal requests to within 48 hours.
#4	Vacation/Sick/PTO	20 Cases	Quickly escalated the concern of inaccurate Service Credit history to I.T. for resolution. Worked with Hypercare team to understand and explain vacation/sick accrual balance takes due to conversion.
#5	Forms	16 Cases	Worked with employees and location POCs to ensure correct forms were easily located and completed accurately.

Customer Inquiries

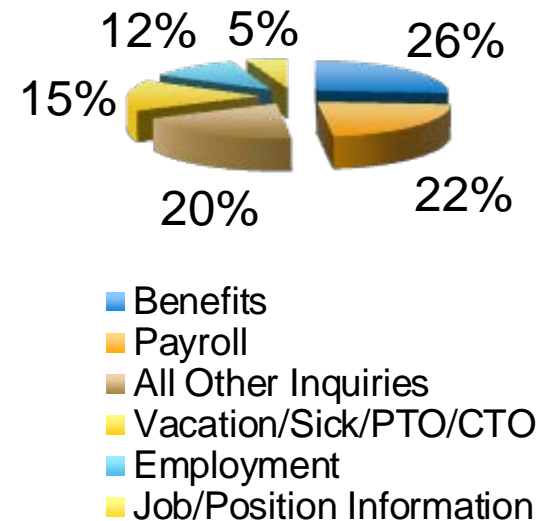


- Benefits
- Payroll
- Employment
- All Other Inquiries
- Vacation/Sick/PTO/CTO
- Forms

UCPath Center: Trends December 2015

Dec. 2015			
	Category	Count	UCPC Response
#1	Benefits	277 Cases	Employees were concerned because Dep Care funds were not reflective on their accounts. Issue was resolved by working closely with the vendor and keeping employees updated.
#2	Payroll	192 Cases	The first paycheck was issued from UCPath and employees were comparing their deductions to previous paychecks inquiring about any differences.
#3	Vacation/Sick /PTO	134 Cases	Managers reported the need to have visibility of their direct reports' leave balances. Employees inquired about leave balances not reflecting in TRS.
#4	Employment	101 Cases	Location POCs and UCPC working together to identify best practices in regards to submitting and processing templates in UCPath.
#5	Job/Position Information	46 Cases	UCPC and location POCs working together to share reports and best practices in regards to submitting cases.

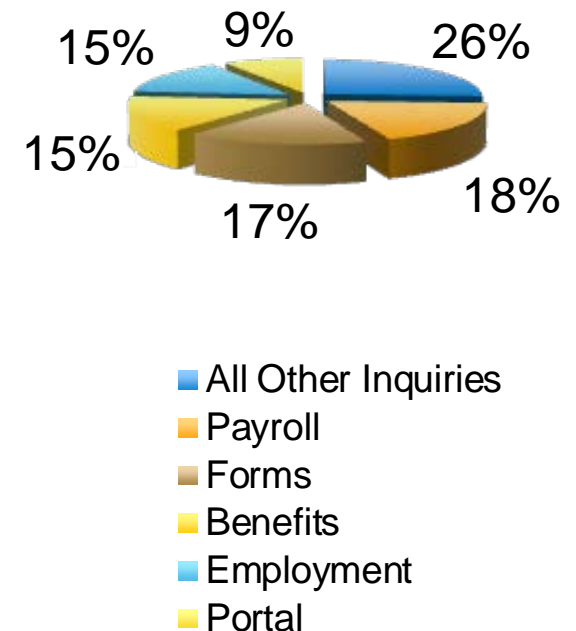
Customer Inquiries



UCPath Center: Trends January 2016

Jan. 2016			
	Category	Count	UCPC Response
#1	Payroll	160 Cases	Employees concerned about receiving 2 W-2s and inquiring about how that will be handled. There were some issues with pre-tax parking deductions that were quickly resolved.
#2	Forms	149 Cases	Questions re: the UCPath UFIN 301 form and forms being initiated by other locations. This is being worked out between UCPC and Location POCs.
#3	Benefits	134 Cases	Employees have questions regarding their new benefit elections; very few late enrollment forms have been submitted. A proactive email was sent to certain employees needing to update dependents.
#4	Employment	129 Cases	Cases between Location POC and UCPC increased re: New Hire Checklists.
#5	Portal	77 Cases	Heavier portal usage from UCOP employees is noticeable by the increased number of inquiries regarding access issues.

Customer Inquiries

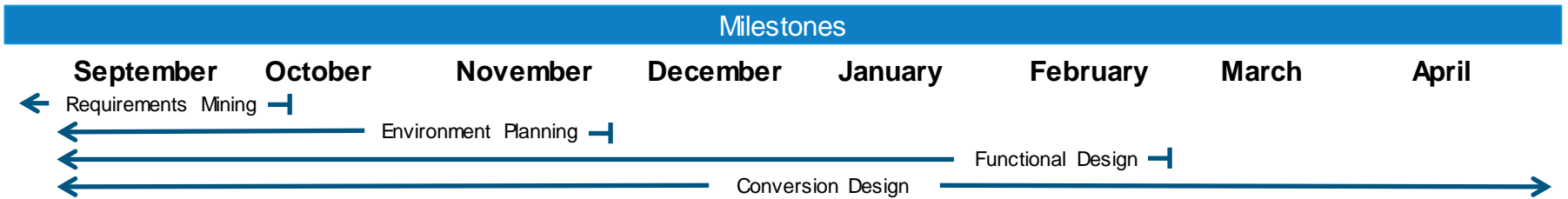


Pilot Deployment Effort – Key 90 Days Successes

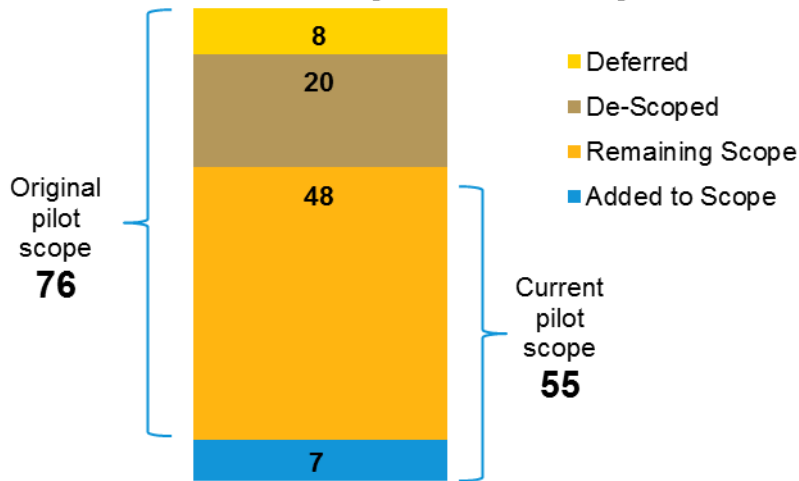


- Collaborative **Completion** of Functional Design and deferment / elimination of 30%+ of pilot customizations
- Design Review **did not result** in any major changes that will negatively impact system build
- **Creation and agreement** on project execution *Framework / Approach* for all work streams (conversion, testing, build, etc.)
- *Framework / Approach* document creates context for the project plan and **helps create a common, multi-campus lexicon**
- **Agreement on plan, timelines, milestones, and campus socialization process to produce vetted end-to-end project plan by April 6th**

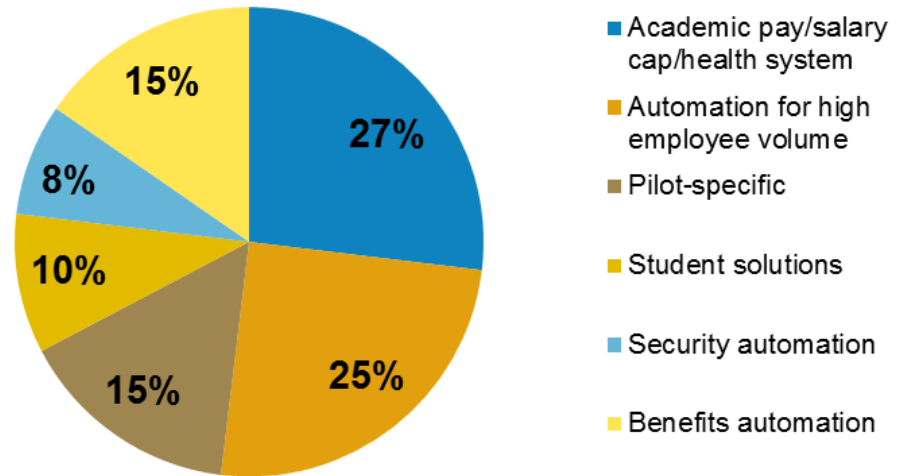
Pilot Focus – Design



Pilot Development Scope



Design Themes



Pilot Timeline Development

February

- Planning kick-off
- Working sessions

March

- Locations / PMO review plan
- Finalize draft of plan and presentation
- Socialize with location leadership
- PDS review and recommendation
- Steering review and recommendation

April

- ELT review and approval
- Distribution to Chancellors
- Present project plan to Chancellors

Remaining Deployments



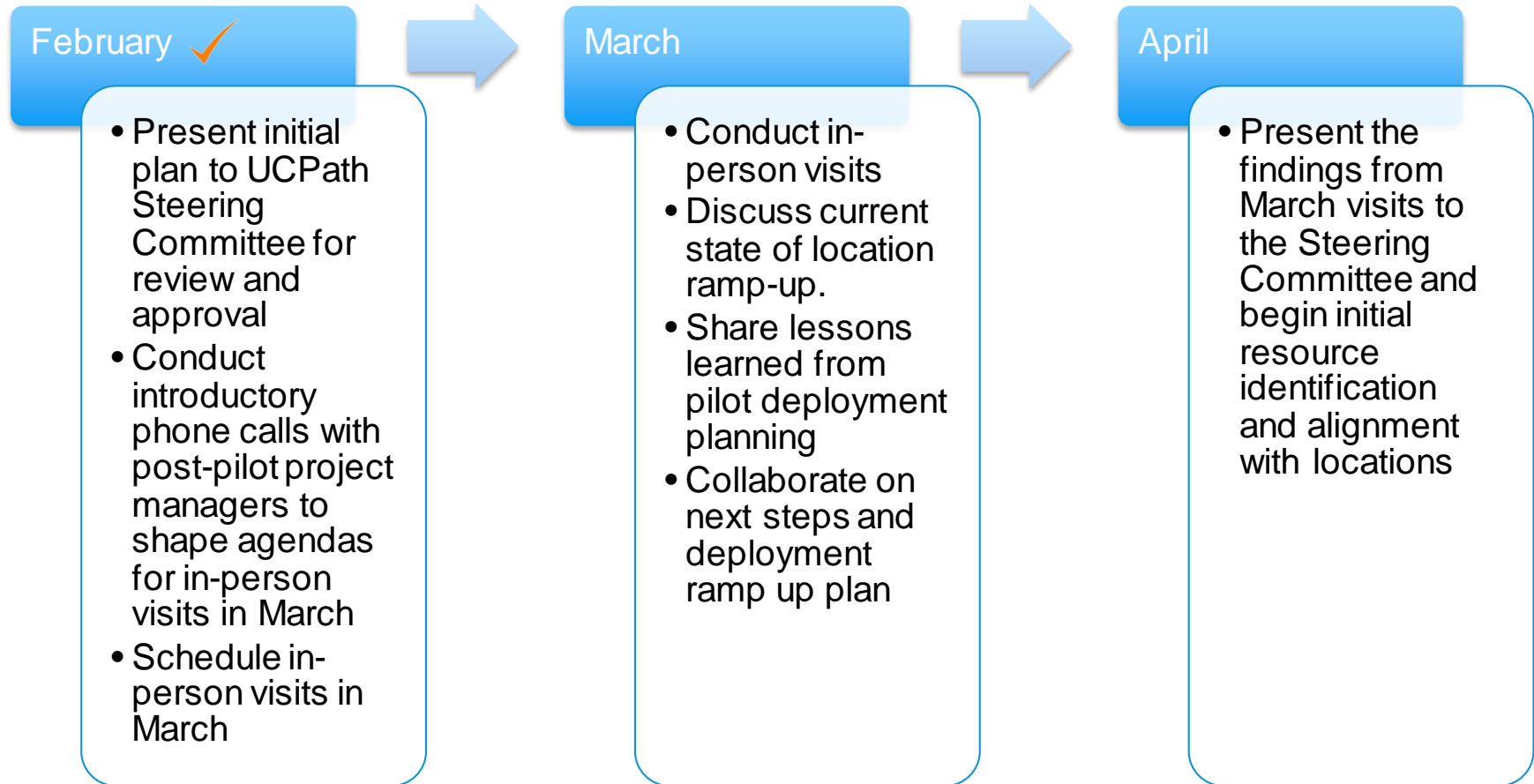
Talent Acquisition & Performance Management:

- Initial requirements have been documented, reviewed with locations and gap analysis is underway
- Inventory of future state processes have been finalized

Deployment Kick-Off:

- Deployment 1 sessions conducted at UC Davis, UC Irvine & ANR
- Initial resource plans for location and cross functional assistance underway
- Deployment 1 sessions with UCSB & UCSC conducted by end of March.
- Deployment 2 sessions are currently being scheduled.

Post-Pilot: Three-Month Planning Overview





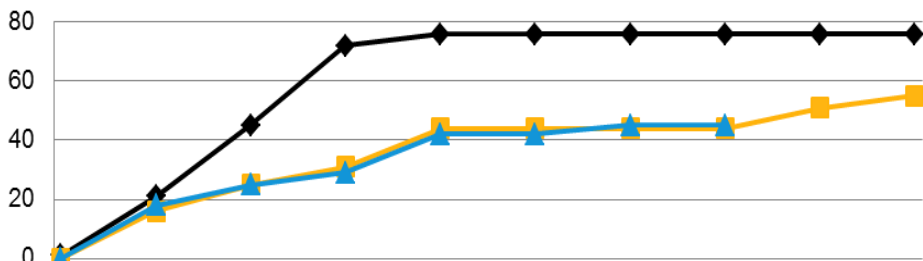
Questions?



Appendix

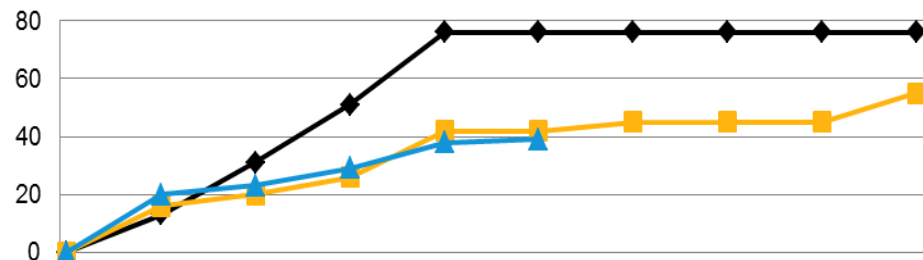
Pilot Status: Functional Design

FDDs in Review



	18-Jan	25-Jan	1-Feb	8-Feb	15-Feb	22-Feb	29-Feb	7-Mar	14-Mar	21-Mar
Original Scope	1	21	45	72	76	76	76	76	76	76
Planned	0	16	25	31	44	44	44	44	51	55
Actual	0	18	25	29	42	42	45	45		

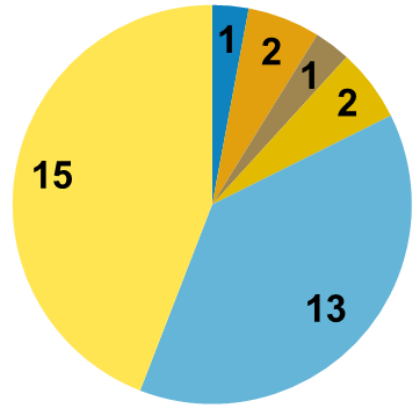
FDDs Signed Off



	1-Feb	8-Feb	15-Feb	22-Feb	29-Feb	7-Mar	14-Mar	21-Mar	28-Mar	4-Apr
Original Scope	0	13	31	51	76	76	76	76	76	76
Planned	0	16	20	26	42	42	45	45	45	55
Actual	0	20	23	29	38	39				

Design Gap Analyses

March 4, 2016



- Pending Clarification
- Pending Central Review
- Pending Location Review
- Withdrawn
- Approved for CR
- Denied

Pilot Status: Technical Design and Development



- Pilot development environment has been deployed. Developers now have access.
- Metrics as of March 7:
 - Approved FDDs: 39
 - FDD review forms initiated: 32
 - Technical design documents (TDDs) in-progress: 14
- TDDs ready for development:
 - E-080 – Program to take employees off Probation
 - E-068 – Custom Form Add/Maintain POIs with AWE
 - E-716 – Work Study
 - E-718 – Budgetary costing for changes in compensation
 - E-056 – Create a Benefits Enrollment Summary Page With History Data
 - I-233 – UCLA Banks Info Outbound
 - I-159 – Work Study Inbound
 - I-151 – 1042(S) for Payroll Earnings Outbound

Pilot Status: Conversion



Scrambled production data will be available to pilot locations by April 1:

- UCLA will lead the effort to release masked UCOP production data
- Target release date is April 1, 2016
- Same data set as planned previously
- Delivery via SAFE email
- Pilot locations will load files with straight SQL and not require the JAVA loader