Impacts for Academic Units
March 2019
A message from Philip H. Kass, Vice Provost of Academic Affairs
What is UCPath?

- **A UC-wide new, modern system** for delivering payroll, benefits, human resources and academic personnel needs for all 229,000 academic, staff and student UC employees.

- **Core academic personnel processes unchanged**: recruitment, advancement, leave of absence requests, outside professional activities;

  **but some of the business systems processes supporting them are changing.**

- UCPath **replaces 40-year-old system** (UC Payroll Personnel System, PPS), built with 1960s-era COBOL programming language.

- UCPath is **built on the Oracle/PeopleSoft** Human Capital Management platform, customized for UC.
What is the roll-out sequencing?

Currently Operational:
Los Angeles
Santa Barbara
Riverside
Merced
Office of the President

Go-Live planned for April 1, 2019
Berkeley

Future Go-Live
Davis
Irvine
San Diego
San Francisco
Santa Cruz
ANR, LBL, Hastings

UC Employees transitioning to UCPATH (in thousands)

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Why did Davis postpone implementing UCPath?

- Concerns about data conversion and payroll accuracy.
- More time to test downstream systems.
- More testing of ledger data.
- More time to implement the Talent Acquisition Management (TAM) employee recruitment module.
- More time for training on the new system.
What major processes are changing?

- Hiring (onboarding)
- Position Management
- Payroll Funding
- Salary Cost Transfer
- Time and Attendance
- Extended Leave Administration
- Retirements and Resignations (offboarding)
How will information access change?

View, update, print information from your computer, mobile phone or tablet.

▶ To enhance the security of your information, all current employees must use Duo to access the UCPath portal. Duo supports smart phones, iPads, basic cell phones, landline phones and tokens. UC Davis Health employees will need a second instance of Duo to access systems such as EPCS, Office 365, VPN, HS Apps, and other applications from off-site locations. More information on how to get started with Duo at http://kb.ucdavis.edu/?id=2934 or talk to with your department if you need assistance.

▶ Retirees will continue to use AYSO and will not need Duo unless they are on active recall.

▶ Personal Information: name, mailing address, personal email, emergency contacts, honors/degrees, licenses/certifications, disclosure forms, more.

▶ Benefits Enrollment: update only available during open enrollment or life events (marriage, baby, etc.).
How will information access change? (cont.)

• **Direct Deposit**: specify up to three accounts (now including credit unions as well as banks).

• **Earnings Statements**: edit federal and state tax withholding, view annual wage reports (W-2), verify employment.

  For 2019 only, UC Davis employees will receive two W-2 forms:
  1. For the period *before* UCPath go-live, viewable in AYSO (PPS)
  2. For period *after* we go-live, accessed through the UCPath portal

• **Leave Balances**: monitor sabbatical credits, vacation, sick, paid time off.

• **Supervisor Portal**: view employment information about staff and students that you supervise.

• **Access to ePerformance** for academic managers of staff.

• **Access to the TAM module** to view candidate information for staff recruitments.
For qualifying academics, an *estimate* of your *sabbatical leave credits* will be available to you through the UCPath portal. UCPath cannot capture exceptions, so always consult your department/dean’s office to ensure an accurate sabbatical credit count when preparing for sabbatical leave.
Continuing AYSO (At Your Service) functions

The following will remain for the near term, with future migration to UCPath:

- Retirement estimator
- Beneficiary information (view/update)
- W-2s and paychecks, prior to go-live (view/print)
- Benefits information (view)
- Retirement savings account, via Fidelity website (view/modify)
- Retiree benefits, including pension benefits, will continue to be administered through the Retirement Administration Service Center (RASC) for now. Form 1099-R available through AYSO.
How will UCPath be administered?

The general campus and Health combined employee population of 33,000 will be served by the system-wide UCPath Service Center (UCPC), located in Riverside, CA.

Services will be delivered via four service channels. Please direct any questions or concerns you have to your department staff. They will coordinate with your unit’s service channel.

- **AUSS-C** - Colleges of Biological Sciences, Engineering, Letters & Science; Schools of Education, Law, Management, Veterinary Medicine; Intercollegiate Athletics
- **DiSSC** - College of Agricultural & Environmental Sciences
- **Health** - Schools of Medicine and Nursing, UC Davis Health System, UC Davis Medical Groups
- **Shared Services Organization** - SSO includes administrative departments, Graduate Studies, Office of Research & ORUs, Library, University Extension, ASUCD
Other changes: **Payment methods**

**Three ways** in which you can receive your pay:

1. **Direct Deposit:**
   - Now specify up to three account destinations. Academic, staff and student employees are strongly encouraged to use it - fast, safe, reliable and eco-friendly! And faster changes to your Direct Deposit preferences.

2. **Paper Checks:**
   - Paychecks and emergency checks (now likely rare) can no longer be picked up at the Payroll Office. All checks will be mailed from a centralized processing facility to the home address on file -- so it is important to keep your address current.

3. **Pay Cards:**
   - We are planning to offer personalized pay cards to non-represented employees as a third payment option. They will function like pre-paid VISA debit cards that can be topped up with each pay cycle. Cash may be withdrawn without fees at a variety of in-network locations. Fees will apply if cash is withdrawn outside of network. A valid social security number is required in order to receive a pay card. *Final decision forthcoming for represented employees.*
Other changes: Additional Compensation

- **One-time payments** – like housing allowances or retroactive summer compensation – **will no longer be paid out on checks that are off-cycle from the employee’s regular pay.**

- Monthly pay cycle employees will **not** be able to get additional compensation paid out on a biweekly cycle check.
Student Pay Issues

- Student pay is **complex**:
  - Students **transition** in and out of University jobs more frequently than academic and staff employees do.
  - Many students have **multiple jobs** simultaneously.
  - **Payroll deductions** for students are based on criteria that have complex compliance requirements, such as number of credit units taken and position held.

- UCPath software defects affecting student pay **have been resolved**.

- In order for student employees to receive their correct pay and benefits:
  - They must go through the **hiring process** before they may begin working.
  - Simply having **an offer letter is insufficient**. Students must complete the hiring paperwork and be entered and fully approved in UCPath before they begin working.
  - Students should **stay in touch with their department** over the course of time to ensure that any subsequent jobs are being processed for each quarter that they expect to be paid.
The challenges are now local **process issues**, such as:

- Adhering to **hiring timelines**; these are critical in order to be paid in a timely manner,
- Adhering to **time-reporting** deadlines,
- Having the **most up-to-date personal and contact information**, and
- Letting your department know right away if your pay or benefits are incorrect.
- Enrolling in **direct deposit** to ensure they receive their pay on payday.

Staff and academics hired on soft money will face issues similar to those noted above for students.

Once we go-live on UCPath, we will have a Base Camp staffed with experts that will work with our service channels and the UCPath Center to promptly address any discrepancies in pay or benefits for all employees. The Base Camp will remain operational until the campus has stabilized its transition to UCPath.
Managing Through Change Together

- Your staff will have to learn new systems that can be complex.
- Staff in your department and in central campus may not be able to make last minute corrections for you that were possible with the old system. In the new system, they may not be able to fix errors as quickly.
- Some processes may take longer to complete, such as hiring.
  - If you forget to tell your department that you hired someone (e.g., a postdoc), the system won’t allow an expedited payment.
Managing Through Change Together

Communicate with your staff well in advance.

Be patient and understanding during this transition.

This is a culture change.
UCPath will enable our complex, diverse and growing organization to do business effectively in the future.

- An easier, faster way to interact with key information
- A unified platform across the entire UC system
- **24/7 access to the UCPath portal on mobile devices, desktops, and tablets**
- Easily view balances, statements and supervisor information
- Greater Direct Deposit flexibility
More UCPath information?

WEB:
https://ucpath.ucdavis.edu/
https://ucpath.ucdavis.edu/articles/ucpath-portal

EMAIL:
ucpath@ucdavis.edu

PATHFINDERS:
Designated staff member for your department (or the UCPath representative of your college/school).

TOWNHALL MEETINGS
In both Davis and Sacramento.

UCPath PROJECT TEAM:
Key members from Academic Affairs and Graduate Studies, to update groups:

- Academic Senate
- Academic Federation
- Postdoctoral Scholars Association
- Graduate Student Association
- Graduate Student Advisory Committee
- ADMAN
- Staff
Q&A