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

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>UCPC Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Benefits</td>
<td>1,096</td>
<td>Cases Instantly able to send employees their personalized O.E. Link; Answer questions regarding different various medical/dental plans.</td>
</tr>
<tr>
<td>#2 Payroll</td>
<td>104</td>
<td>Cases Walked employees through adding multiple banks/credit unions as direct deposit options.</td>
</tr>
<tr>
<td>#3 Employment</td>
<td>46</td>
<td>Cases Improved the VOE response time for both written and verbal requests to within 48 hours.</td>
</tr>
<tr>
<td>#4 Vacation/Sick/PTO</td>
<td>20</td>
<td>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.</td>
</tr>
<tr>
<td>#5 Forms</td>
<td>16</td>
<td>Cases Worked with employees and location POCs to ensure correct forms were easily located and completed accurately.</td>
</tr>
</tbody>
</table>

### Customer Inquiries

- **Benefits**: 83%
- **Payroll**: 8%
- **Employment**: 3%
- **All Other Inquiries**: 3%
- **Vacation/Sick/PTO/CTO**: 2%
- **Forms**: 1%
<table>
<thead>
<tr>
<th>Category</th>
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</tr>
</thead>
<tbody>
<tr>
<td>#1 Benefits</td>
<td>277 Cases</td>
<td>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.</td>
</tr>
<tr>
<td>#2 Payroll</td>
<td>192 Cases</td>
<td>The first paycheck was issued from UCPPath and employees were comparing their deductions to previous paychecks inquiring about any differences.</td>
</tr>
<tr>
<td>#3 Vacation/Sick/PTO</td>
<td>134 Cases</td>
<td>Managers reported the need to have visibility of their direct reports' leave balances. Employees inquired about leave balances not reflecting in TRS.</td>
</tr>
<tr>
<td>#4 Employment</td>
<td>101 Cases</td>
<td>Location POCs and UCPC working together to identify best practices in regards to submitting and processing templates in UCPPath.</td>
</tr>
<tr>
<td>#5 Job/Position Information</td>
<td>46 Cases</td>
<td>UCPC and location POCs working together to share reports and best practices in regards to submitting cases.</td>
</tr>
</tbody>
</table>
## UCPath Center: Trends January 2016

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>UCPC Response</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>#1</strong> Payroll</td>
<td>160 Cases</td>
<td>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.</td>
</tr>
<tr>
<td><strong>#2</strong> Forms</td>
<td>149 Cases</td>
<td>Questions re: the UCPath UFIN 301 form and forms being initiated by other locations. This is being worked out between UCPC and Location POCs.</td>
</tr>
<tr>
<td><strong>#3</strong> Benefits</td>
<td>134 Cases</td>
<td>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.</td>
</tr>
<tr>
<td><strong>#4</strong> Employment</td>
<td>129 Cases</td>
<td>Cases between Location POC and UCPC increased re: New Hire Checklists.</td>
</tr>
<tr>
<td><strong>#5</strong> Portal</td>
<td>77 Cases</td>
<td>Heavier portal usage from UCOP employees is noticeable by the increased number of inquiries regarding access issues.</td>
</tr>
</tbody>
</table>

### Customer Inquiries

- **Payroll**: 26%
- **Forms**: 15%
- **Benefits**: 9%
- **Employment**: 17%
- **Portal**: 18%
- **All Other Inquiries**: 15%
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

Milestones

- September: Requirements Mining
- October: Environment Planning
- November: Conversion Design
- December: Functional Design
- January: 
- February: 
- March: 
- April: 

Pilot Development Scope

Original pilot scope 76
- 8 Deferred
- 20 De-Scope
- 48 Remaining Scope
- 7 Added to Scope

Current pilot scope 55

Design Themes

- 27% Academic pay/salary cap/health system
- 15% Automation for high employee volume
- 15% Pilot-specific
- 10% Student solutions
- 8% Security automation
- 15% Benefits automation

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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

February

- Present initial plan to UCPath Steering Committee for review and approval
- Conduct introductory phone calls with post-pilot project managers to shape agendas for in-person visits in March
- Schedule in-person visits in March

March

- Conduct in-person visits
- Discuss current state of location ramp-up.
- Share lessons learned from pilot deployment planning
- Collaborate on next steps and deployment ramp up plan

April

- Present the findings from March visits to the Steering Committee and begin initial resource identification and alignment with locations
Questions?
Appendix
Pilot Status: Functional Design

FDDs in Review

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<th>Date</th>
<th>Original Scope</th>
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<th>Actual</th>
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<tr>
<td>18-Jan</td>
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<tr>
<td>25-Jan</td>
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<td>16</td>
<td>18</td>
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<tr>
<td>1-Feb</td>
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<td>8-Feb</td>
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<td>15-Feb</td>
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<td>29-Feb</td>
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<td>7-Mar</td>
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<td>14-Mar</td>
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<td>21-Mar</td>
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FDDs Signed Off

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<tr>
<td>1-Feb</td>
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<tr>
<td>8-Feb</td>
<td>13</td>
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<td>15-Feb</td>
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<td>4-Apr</td>
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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
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