UCPath Project Status Report

Report Date	September 7, 2012	Project Director	Anthony Lo Anthony.Lo@ucop.edu	Executive Sponsors	Nathan Brostrom Peter Taylor		
Project Summary				**Scope**	**Schedule**	**Budget**	**Resources**
The project continues to complete remaining design questions so that development can be completed in time for January's scheduled system integration testing. Throughput for technical designs and development will need to significantly increase over the next few months to meet this milestone. In particular, the pace of interface development needs to pick up to ensure that interfaces are completed before (or at least during) the testing window. Similarly, Wave 1 project teams should now be well underway in critical areas such as data conversion, interface design and development, and test planning. The UCPath website will launch September 18 as the cornerstone of a substantial ramp up in communication about UCPath. The website will include a wealth of information about the UCPath Center, including the jobs that will be open for recruitment in November.				🟩	🟨	🟩	🟨

Key Accomplishments/Decisions

✓ The first three weeks of Configuration Workshops, including HR and Academic Personnel areas have been completed.
✓ The Management Workgroup has agreed to begin preliminary planning to convert all non-exempt employees to biweekly pay cycles by the end of January 2013 at all locations that haven't completed this conversion to date. This conversion represents a critical UC-wide process standardization effort that will significantly reduce retroactive payroll transactions by reducing the amount of projected employee time submitted to payroll.
✓ Enwisen is now fully engaged on the project to implement the case management/knowledge management tool.
✓ The UCPath PMO has completed initial mapping of entry points into UCPath, i.e., employee/manager self service, case management, direct PeopleSoft system access. The team will next work on effectively communicating these entry points to local project teams.

Continuing/Upcoming Activities

✓ There are four weeks of configuration workshops remaining. They will address Benefits, Payroll and Commitment Accounting functions.
✓ GL/financial system integration teams continue to wrap up remaining designs.
✓ The UCPath Center facility concept design is complete. An RFP for interior buildout is under development.
✓ Wave 1 locations are focused on data cleanup, interface design and development, local ODS and data warehouse planning, and development of local business processes. A table of current activities is shown on page 8.
✓ Work with HR/Labor Relations to execute the strategy/plan for UCPath implementation of those items with bargaining unit implications.
✓ Final touches are being made to the UCPath website, which will launch publicly on September 18. It will be available for PMO review beginning September 10.

Outstanding Key Decisions

✓ *Agreement on a standard medical center PTO program.*
  Status*: Systemwide HR and the medical center CHROs are discussing the existing programs. There is agreement on consolidation of the variations into two plans, but there is not yet agreement on a single standard.*

✓ Identify Wave 2 and Wave 3 locations
  Status*: UCSD campus and medical center along with UCR are part of Wave 2. The Executive Sponsors are contacting individual locations for additional Wave 2 candidates. A likely candidate has been identified, but final details are still being worked.*

✓ Process Standardization: Systemwide implementation of biweekly pay cycles for non-exempt employees and systemwide implementation of factor accrual by January 31, 2013
  Status*: The Management Workgroup agreed to begin planning for January 31 implementations. Work is in progress by UCOP to determine if an extension is possible without jeopardizing UC's ability to implement this transition.*

Project Status

Project Management	Start Date	Finish Date	Status	Decisions, Issues and Risks
1. Staffing	8-22-11	ongoing	🟩	✓ Recruiting is mostly completed for UCPath PMO positions.
2. Project Planning and Tracking	9-6-11	ongoing	🟨	✓ Functional specification development remains slightly behind schedule. Interface development continues to be a significant concern and focus area.
3. Campus Coordination	11-8-11	ongoing	🟩	

Project Management

✓ **Staffing** – The majority of outstanding UCPath PMO positions have now been filled or will be filled this month. A couple positions remain difficult to fill, but contractors are being engaged as needed to ensure that key deliverables are met. The UCPath PMO is working with location PMOs to identify local project tasks that can be centralized to mitigate the impact of concurrent workstreams on location resources. Most recently, campuses have requested UCPath PMO assistance with training delivery.

✓ **Project Planning** – The current UCPath Status Summary is shown on page 6 of this report for central project team activities. While there has benn some progress, there is not yet sufficient visibility of project status and alignment for Wave 1 locations,

System Implementation – Wave 1	Start Date	Finish Date	Status	Decisions, Issues and Risks
1. Integration and Conversion Strategies	10-1-11	1-6-12	Done	✓ While significant progress has been made to complete functional designs, there are a few areas with business decisions that remain outstanding or are changing, such as benefits and GL integration. At the same time, the pace of technical design and offshore development is not yet adequate to meet milestones. Oracle is ramping up and doubling the current size of its offshore development team to support the development "hockey stick" and mitigate potential delivery delays.
✓ The UCPath PMO is developing multiple approaches for clarifying and communicating the various access points to UCPath, including PMO reviews, demos held in conjunction with configuration workshops and the next series of business process mapping sessions.
✓ In order to complete development within the development window, Wave 1 locations need to move forward based on information that is now known and not wait until all issues and questions have been fully resolved. A list of design and development items that should be underway now at Wave 1 locations follows on page 8.
2. Process Design	10-15-11	10-15-12	(green)	
3. Configuration	11-1-11	9-30-12	(yellow)	
4. Data Mapping	11-21-11	11-1-12	(yellow)	
5. Define Initial Business Process Maps	1-3-12	5-31-12	Done	
6. Review and Approve Initial BPMs	6-1-12	8-31-12	Done	
7. CRP2, Configuration and BPM Sessions	8-13-12	10-31-12	(green)	
8. Functional Design	1-9-12	8-30-12	(red)	
9. Technical Design	1-16-12	9-15-12	(yellow)	
10. Data Clean up	2-9-12	2-28-13	(green)	
11. Development	3-5-12	11-30-12	(yellow)	
12. Test Planning	5-9-12	10-31-12	(green)	
13. Develop Second Set of BPMs	9-13-12	10-29-12		
14. Review and Approve Final BPMs	10-10-12	11-30-12		
15. System Integration Testing	11-1-12	5-31-13		
16. Performance Testing	2-15-13	4-30-13		
17. Payroll Parallel Testing	3-1-13	5-31-13		
18. User Acceptance Testing	4-1-13	5-31-13		
19. Cutover	6-1-13	6-30-13		

System Implementation

- ✓ **Process Design** – There are five outstanding business process areas from the first round of business process mapping (BPM) that are being/will be addressed by the Practices Board. Preliminary discussions are underway with the Practices Board regarding paycards and online employee entry of licensure and certification information. BPM2 begins in October for most areas, and the participant list is posted on SharePoint.

- ✓ **Conference Room Pilot (CRP)** – The first three weeks of configuration workshops have been very well received by the SMEs in attendance. The HR sessions, including Academic Personnel, are now complete. Benefits sessions take place next week, followed by Absence Management, Payroll and Commitment Accounting.

- ✓ **Functional Design** – Oracle and UC resources continued focus on gap analysis and functional design development. Since the last report, the UCPath PMO has approved two interface functional designs, three gaps and one extension. Of 100 total gaps, there are dispositions on 73. Custom forms for processes requiring approvals are now being designed in Oracle's Approval Workflow Engine.

- ✓ **Data Conversion** – The data team released an updated data validation environment to Wave 1 locations on September 4. The August 30 Data Quality Dashboard for Wave 1 locations follows on page 5. Several benefits data components are new on this

report. Site visits are scheduled at UCLA and UC Santa Cruz this month to review data conversion plans and address questions and/or issues.

✓ **GL/financial system integration –** Campuses continue to provide feedback on 14 GL integration functional designs, including the design for the labor ledger. The GL team conducted a site visit with UC Irvine and has scheduled similar visits to UCSF, UC Davis, UC Merced and UC Riverside to address campus-specific questions and discuss progress to date. Continued discussions about budget data requirements will delay completion of that functional design until later this month.

✓ **Technical Development** – The Identity Management (IDM) project plan is under review by campuses. Interface designs are also under campus review as proofs of concept. There is a final UCNetID design. Teams from UCOP and UC Berkeley are finalizing plans and budget requirements for UCPath use of UCB's Production Control Shared Services Center. Comprehensive planning is underway for "Day Two" IT support for UCPath.

✓ **Testing** – The system integration test (SIT) plan has been drafted, and the payroll parallel test plan is under development. The testing team continues development of test cases for completed functional designs. These test cases will be used during testing beginning in January.

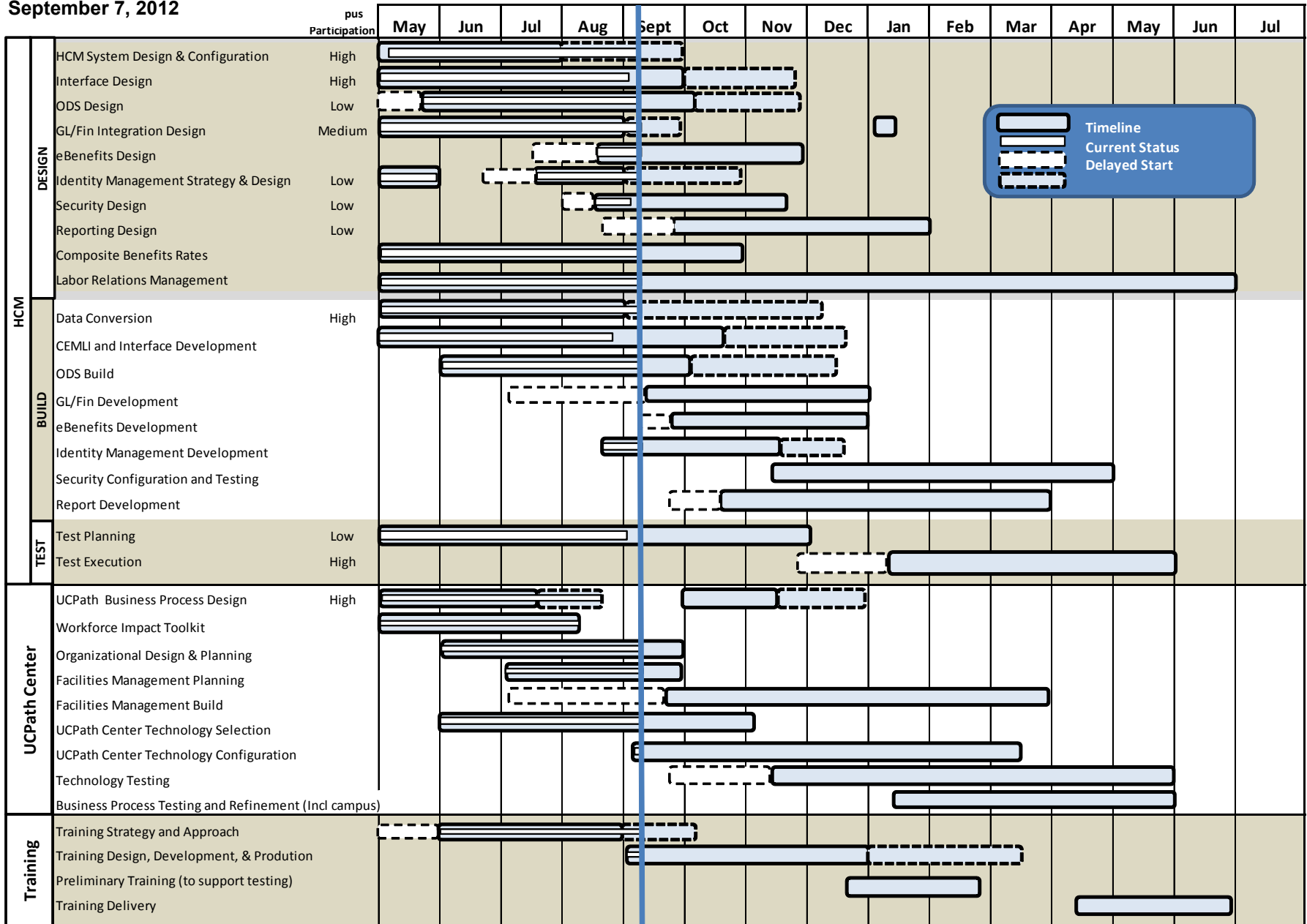| Organizational Change/Communication	Start Date	Finish Date	Status	Decisions, Issues and Risks
1. Change Mgt & Comm Strategies	10-30-11	1-23-12	Done	✓Broad communication about the project and local implications is still relatively limited across all locations. Communication about UCPath will have to increase far beyond project participants in anticipation of UCPath Center job information becoming available in the next two months. ✓Locations have expressed concern about having adequate resources for training on both local business processes and UCPath. This is an area where the UCPath PMO may be able to offload some local activities.
2. Training Assessment, Strategy and Plan	1-15-12	9-30-12		
3. Change Impact Analysis	4-1-12	12-30-12		
4. Organizational Alignment & Readiness	7-1-12	6-30-13		
5. Training Development	9-1-12	3-1-13		
6. Training Deployment	3-1-13	7-30-13		

Organizational Change, Training and Communication

✓ **Communication –** The communications team is developing strategies, plans and messaging in anticipation of a significant increase in communication activity this fall, much of which will be related to the posting of UCPath Center jobs. The UCPath change management and communications lead is hired and scheduled to be on board this month. The UCPath website will launch Tuesday, September 18. Among a host of other information, it will include a *Transition Toolkit* consisting of narrated PowerPoint presentations that describe the UCPath Center and help prospective employees prepare to apply for UCPath Center positions.

✓ **Training –** A high-level training timeline has been shared with location project managers. The training team has drafted a learning matrix based on roles and an end-user training plan that are now under project review.

University of California
DATA QUALITY
DASHBOARD Date: 08/30/2012
Source: UCPath Data Elements

UCPath Conversion Data Quality Dashboard

	ASUCLA		UCLA		UCLA MC		Merced		Santa Cruz		UCOP	
	Previous Run Dt	Current Run Dt	Previous Run Dt	Current Run Dt	Previous Run Dt	Current Run Dt	Previous Run Dt	Current Run Dt	Previous Run Dt	Current Run Dt	Previous Run Dt	Current Run Dt
	7/20/12	8/30/12	7/20/12	8/30/12	7/20/12	8/30/12	7/20/12	8/30/12	7/20/12	8/30/12	7/20/12	8/30/12
TOTAL EMPLOYEES	1,814	1,641	30,177	27,952	22,806	24,612	1,880	1,918	10,488	10,395	1,435	1,457
TOTAL ERRORS	32	26	1,505	1,409	1,566	1,795	22	18	224	179	29	62
1 - Personal Data												
Address delivery unclear	25	25	1,145	1,066	1,047	1,100	9	9	145	110	10	11
Address missing key fields	2	0	117	4	21	1	4	0	44	0	1	0
Invalid Citizenship Status	0	0	4	4	0	0	0	0	0	0	0	0
Invalid Name Suffix	0	0	98	70	306	327	0	0	0	1	0	0
Invalid SSN	0	0	2	0	3	0	0	0	0	0	0	0
Invalid state/country	0	0	4	1	3	3	0	0	1	1	0	0
Non-USA Citizen no Cntry Origin	4	0	13	0	3	0	5	0	4	0	0	0
Wrong zip code	1	0	13	0	5	0	0	0	8	0	0	0
Category Sub-Total	32	25	1,396	1,145	1,388	1,431	18	9	202	112	11	11
2 - Benefits Data												
Dependent Name is Required	0	0	0	1	0	1	0	0	0	1	0	0
Dependent Relationship Issue	0	0	3	2	1	3	0	0	2	1	0	0
Disability Benefits Errors	0	1	78	231	119	301	2	7	14	59	13	37
FSA Benefits Errors	0	0	28	7	58	4	2	0	6	3	5	7
Health Benefits Errors	0	0	0	17	0	48	0	2	0	3	0	6
Health Dependent Errors	0	0	0	6	0	7	0	0	0	0	0	1
Category Sub-Total	0	1	109	264	178	364	4	9	22	67	18	51
3 - Person Profile Data												
Profile Degree Errors	0	0	0	0	0	0	0	0	0	0	0	0
Profile Honors/Awards Errors	0	0	0	0	0	0	0	0	0	0	0	0
Profile Lic/Cert Errors	0	0	0	0	0	0	0	0	0	0	0	0
Profile Prior Inst Errors	0	0	0	0	0	0	0	0	0	0	0	0
Profile Specialty Cd Errors	0	0	0	0	0	0	0	0	0	0	0	0
Category Sub-Total	0	0	0	0	0	0	0	0	0	0	0	0

September 7, 2012

Gantt chart timeline

		pus Participation	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul

HCM — DESIGN
- HCM System Design & Configuration — High
- Interface Design — High
- ODS Design — Low
- GL/Fin Integration Design — Medium
- eBenefits Design
- Identity Management Strategy & Design — Low
- Security Design — Low
- Reporting Design — Low
- Composite Benefits Rates
- Labor Relations Management

HCM — BUILD
- Data Conversion — High
- CEMLI and Interface Development
- ODS Build
- GL/Fin Development
- eBenefits Development
- Identity Management Development
- Security Configuration and Testing
- Report Development

TEST
- Test Planning — Low
- Test Execution — High

UCPath Center
- UCPath Business Process Design — High
- Workforce Impact Toolkit
- Organizational Design & Planning
- Facilities Management Planning
- Facilities Management Build
- UCPath Center Technology Selection
- UCPath Center Technology Configuration
- Technology Testing
- Business Process Testing and Refinement (Incl campus)

Training
- Training Strategy and Approach
- Training Design, Development, & Prodution
- Preliminary Training (to support testing)
- Training Delivery

Legend:
- Timeline
- Current Status
- Delayed Start

UCPath Center	Start Date	Finish Date	Status	Decisions, Issues and Risks
1. Blueprint Development	10-15-11	5-10-12	Done	✓ The timeline for completion of the interior buildout of the UCPath Center is very tight. A construction contract will have to be signed by year end at the very latest. This will mean very aggressive schedules for the RFP development, vendor selection and contracting processes.
2. Technology Needs Assessment	1-13-12	2-15-13	Done	
3. Define Staffing Roles, Job Descriptions and Levels	2-13-12	7-26-12	Done	
4. Define Case/Knowledge Management Requirements	2-15-12	4-30-12	Done	
5. Facilities and Infrastructure Planning	4-2-12	8-31-12		
6. Change Management Planning and Communication	4-16-12	8-31-12		
7. Case/Knowledge Management Vendor Selection	5-11-12	7-20-12	Done	
8. Training Curriculum	5-14-12	9-15-12		
9. Transition Planning	6-4-12	10-31-12		
10. Implementation Build Phase (including staffing, training, change management and post go-live stabilization support)	7-1-12	9-30-13		
11. Post/Communicate UCPath Center Positions	7-15-12	11-15-12		
12. Staff recruitment/selection	11-15-12	3-29-13		
13. UCPath Center Employee Training	4-1-13	6-30-13		

UCPath Center

✓ **Staffing** – UCPath Center job descriptions, organization structure and other supporting documents will be published on the new UCPath website when it launches September 18, and the jobs will be posted for recruitment on the systemwide job board November 1. The staffing plan for Wave 1 implementation includes 156 FTEs. The recruitment agency RFP finalist presentations will take place on September 17. Unfortunately, the expected hiring of the Executive Director candidate has fallen through. As a result, the search has been extended and will proceed in parallel with interviews now underway for the Operations Director and Customer Service Director.

✓ **Technology** – The team is working with Enwisen to develop the project plan for case management/knowledge management implementation. Preparations are underway to issue an RFP for document management technology.

✓ **Facilities** - The budget for the interior buildout of the UCPath Center is being finalized. The building purchase is well underway and should be complete late next month.

✓ **Operations** – The team is compiling a list of business, HR and IT services needed for UCPath Center operations and have begun to document roles and responsibilities among UC Riverside, UCOP and within the UCPath Center.

Wave 1 Location Design and Development Activities That Should be Underway Now

Data Conversion	Systems Integration	Test Planning
Validate the following data converted from PPS into the UCPath system, cleansing data and addressing data conversion errors as identified: • Biographic/Demographic Data • Immigration Data • Dependent Data • Benefits Data Provide employee data from campus systems to UCPath for data conversion in the following subject areas • Licenses and Certificates • Degrees • Direct Deposit (non-primary) • Garnishments FMLA / Catastrophic Leave Balances	Implement infrastructure and complete design and development of Tier 1 system interfaces as interfaces are designed and finalized. Implement infrastructure and complete design and development to integrate the location ODS into the campus data warehouse and Tier 2 systems as data subject areas are defined, including: • Create the local DDODS and ETL scripts to integrate data into the location data warehouse(s). • Perform impact analysis for applications receiving (or that are planned to receive) UCPath data via the location DDODS and data warehouse(s), including assessment of new systemwide data values and structures that will be implemented in conjunction with UCPath. • Align planning and development efforts with Tier 2 application owners.	Identify and procure technical environments required to support integration and user acceptance testing. Gather support for integration testing effort from Tier 1, Tier 2 and Tier n application owners.

Workstream	Decision Made
Project Management	The project and resulting system will be branded as "UCPath," where Path is an acronym for Payroll, Academic Personnel, Timekeeping and HR.
	Funding model will be based on funding streams and memo has been sent to campuses.
	The overall project timeline will be extended by three months, while the Wave 1 implementation will be extended by six months to July 2013.
	All Wave 1 locations will complete conversions to biweekly pay prior to parallel payroll testing and system go-live.
	UCSD will remain in Wave 2.
	The UCOP ODS team will support development of local ODS compilation tools to alleviate some of the development workload on Wave 1 locations.
Process Standardization	The UCPath PMO will deliver the Workforce Impact Analysis tool. Campuses and medical centers may use the tool as desired, but execution will be fully location-driven.
	UC will not convert exempt employees who are currently paid monthly to the biweekly pay cycle.
	Pay cycles will be standardized per the recommendation approved last fall to monthly (MO) and biweekly (BW) cycles for all employees (staff and academic personnel).
	Employees who have accrued more than two years' worth of vacation leave will be notified to reduce their accruals to two years' worth or less by June 30, 2013, in compliance with current vacation leave accrual policy. After this date, those who continue to carry more than the maximum of accrued vacation will not accrue additional vacation leave until they are below the maximum. Locations will be able to accommodate rare exceptions to meet University operational needs.
	UC will change from the current practice of 2088 hours to the more common 2080 annual work hours. To minimize the near-term impact on downstream systems, this change will coincide with Wave 3 implementation or soon thereafter (at a convenient/leveraged transition point).
	There should be greater coordination and support for campus pay cycle conversions, including development and changes to PPS and conversion timing. This coordination will maximize synergies of similar efforts at multiple locations.
	Benefits deductions for employees paid biweekly will be split evenly between the first two paychecks in the month. When there is a third paycheck in the month, it will not have benefits (or any voluntary deductions) taken.

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[1] Items added with this issue are in **blue** text.

Process Standardization, con'd	Factor accrual methodology will be used to accrue vacation leave for all employee populations except faculty.
	There will not be a UC-wide catastrophic leave bank.
	The standard workweek for UC employees will be Sunday – Saturday.
	Holiday pay calculations for part-time employees will be standardized across all locations. Pay is based on eligibility determined by the quadriweekly cycle, defined as the two biweekly pay periods immediately preceding the biweekly pay period in which the holiday occurs.
	Compensatory time will be paid out prior to an employee's hire at another location.
Data Conversion	Data will be converted for all active employees back to January 1, 2011.
Payroll	Employees will receive a single W-2 in the year their location implements UCPath.
GL Integration	All budgeting and forecasting will take place within the campus budget systems. Although budget checking is not in scope for UCPath, the UCPath system will support real-time FAU/funding codes edits currently utilized by campus sytems.
	Composite Benefits Rates will be implemented UC-wide.
	Default funding will be configured at the department level. Suspense funding may be maintained at the campus or department level per campus preference.
	The financial class (account code) will be six characters (sub – 2 characters and object code – 4 characters). Sub accounts will be maintained systemwide. Location account, department and fund will be required chartfields in FAU (combination code).
UCPath Center	The UCPath Center will be located at UC Riverside.
	There will be one systemwide Shared Service Center. It will provide administrative support for Payroll, Workforce Administration, Leaves of Absence, and Benefits.
	The Shared Service Center will open in conjunction with the Wave 1 go-live of the new HR/payroll system and provide services to Wave 1 locations.
	Campuses and employee populations will not be able to opt out of the systemwide Shared Service Center.
	Employee self-service and manager self-service will be broadly utilized. Data entry for all types of non-self service transactions will occur at the systemwide Shared Service Center.
	The following functions will not be supported centrally within the Shared Service Center: Staffing and Recruiting, Learning Management, Performance Management, Employee and Labor Relations.
	Historical employee documentation will remain at campuses, although there is the possibility of pursuing digital archiving in the future.
	Leave of absence administration at the shared services center will be limited to status management at initial go-live. At a later point, end-to-end leave management administration will be implemented.
	Service Level Agreements will be implemented with shared services center customers (campuses and

UCPath Center, con'd	leadership). SLAs will be phased in following the stabilization of UCPath Center operations.
	The shared services center will operate 7 am to 7 pm. The center will be closed on University holidays and weekends.
	The systemwide shared services center will be called the *UCPath Center*.
	The Design Team will serve as the Interim Advisory Board to oversee the UCPath Center's design and build until the permanent board is established.
	All employees/customer groups will receive the same excellent service in the standard model with training to ensure knowledge of each customer group.
	A dedicated UCPath Center team will support the specialized needs of central campus HR/Payroll professionals.
	The web and telephone will be the primary means of communication with the UCPath Center. The web portal will be tightly integrated with the underlying PeopleSoft technology so that information updates made in the web portal go directly into PeopleSoft.
	The employee population in each implementation wave will use UCPath for open enrollment and to maintain benefits information.
	Calls to UCPath Center will be recorded for quality purposes.
	Email to UCPath Center will be supported via a common, monitored UCPath Center mailbox.
	Mail and fax communication to UCPath Center is discouraged and generally not accepted. There will be exceptions for doctor communications, power of attorney, and other required documentation.
	Chat and mobile capabilities are not supported for Wave 1, though possibly desired as part of the future vision.
	The UCPath Center will implement technology, including an automatic call distribution system to help route calls to UCPath Center customer service representatives, a case management system to log call information and a knowledge management system to aid in customer support and generally document standard operating procedures.
	The center will be organized into these work areas: Customer Service, Operations, Quality and Performance, Technology and Business Operations.
	At Wave 1 go-live, the customer service representatives will be organized into functional areas of expertise: Workforce Administration, Payroll and Benefits.
	Controllers at the campuses and medical centers will have direct access to the Payroll Operations Team to resolve issues.
	For business continuity planning, UC will not use a "hot site" due to cost of the site and availability of alternate campus locations. In the event updated payroll cannot be run, the previous payroll will be submitted for processing.
	UCPath Center will use English as the primary support language, and a third party translation vendor will be available for multi-language support.
	Internal UC candidates will receive priority consideration for UCPath Center jobs. Employees at all locations will be eligible to apply for positions during each wave.

UCPath Center, con'd	As many "critical early hires" as possible will be hired into permanent UCPath Center positions to develop continuity, instill buy-in and to attract the best UC talent possible.
	All check printing will take place at the UCPath Center; there will be no local printing of paychecks.
	The UCPath Center will report to Executive Sponsors Peter Taylor and Nathan Brostrom.
	The case management system web portal will serve as the primary entry point for location employees to communicate with and receive services from the UCPath Center by unifying several underlying technologies.
	Custom PeopleSoft forms will be created to support specified UCPath Center requests. These forms will utilize the Oracle Approval Workflow Engine (AWE) which allows location managers and HR to route the forms as necessary for local approvals prior to UCPath Center submission and processing.

System Area	Decision Made
Absence Management	Time and attendance patterns 1 and 4 will be adopted for Absence Management. Absence Management will be the system of record for usage and accrual.
	Gap 043: Automate billing setup for leaves – To be addressed with a manual business process. There is no customization that would automate all types of leave transactions. Benefits billing will be addressed as part of leave administration.
	Gap 059: Sick leave reinstatement after rehire – An extension will automate the calculation and maintenance of sick leave.
	Gap 060: Ability to see absence balances as of the absence date – PeopleSoft functionality is consistent with current business practices. Will address with user training.
	Gap 062: Restrict employee self service proxy to supervisor – An extension will accommodate this restriction.
	Gap 063: Notepad capability for absence adjustments – Will be addressed by an extension.
Benefits	Gap 018: Benefits pay banding using prior and current years – Not a gap; will be resolved by configuration.
	Gap 024: Roll up multiple appointments to primary appointment to drive retirement, benefits, etc. – This gap will be addressed with an extension in combination with Payroll Gap 084.
	Gap 025: Edits for duplicate enrollments – Will be addressed by an extension.
	Gap 041: Benefits eligibility – Multiple eligibility requirements will be resolved with an extension.
	Gap 042: Ability to automatically de-enroll dependents based on marital status and age – Will be resolved with a PeopleSoft extension.
	Gap 044: Consolidated billing rates – An extension will be created to maintain contract rates.
	Gap 045: Retirement contribution percentage limit – Not a gap; will be handled as a configuration item.
	Gap 064: Previous Year Benefits Rates Based on ABBR – An extension will create four additional accumulators to identify earnings for MCB, Life, Executive Life and Disability.
	Gap 066: AYSO Benefit Election Changes – Not a gap; delivered functionality meets business requirements for new hire enrollments.
	Gap 067: Covered comp limits are fiscal year limits, not calendar year limits as in PeopleSoft – Approved for detailed design of change.
	Gap 075: Legal plans – Not a gap; will be addressed by configuration.

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[2] Items added with this issue are in **blue** text.

Benefits, con'd	Gap 085: Health benefit rate – An extension will allow 2000+ benefits rates to be uploaded to avoid potential errors with manual keying on an annual basis.
	Gap 094: Simplify Retirement Plan Rates – Will be addressed by configuration.
Case Management	Enwisen has been selected as the UCPath case management/knowledge management tool.
Configuration	UC will be configured as a single entity (one "company" in PeopleSoft nomenclature) within PeopleSoft with a single set of federal and state tax IDs for payroll and W-2 purposes.
	Job codes will be standardized across all locations
	UC will not attempt to institute standardized departmental organizations within PeopleSoft.
	PeopleSoft self service and eBenefits capabililties will be used for benefits administration (including open enrollment) instead of AYSO as locations go live in their scheduled waves.
	UCPath campuses will use PeopleSoft HR Business Unit as a location identifier. The HR Business Unit will be used as an identifier for all reports and interfaces. We will phase out the usage of the numeric locations and sub-locations that identify each campus as each wave implements PeopleSoft.
Data and Reporting	Hyperion will be implemented once Wave 3 is live while Business Analytics will be implemented along with each wave.
	Except in extraordinary circumstances, data will not be "pulled" from the PeopleSoft environment; rather, data will be "pushed" to locations for use by local data warehouses or operational data stores (ODS).
	Interfaces will be designed to produce comprehensive data supersets; campuses will pull data they require from these supersets for local use.
	Shared Technology Services will provide data governance for all data elements in UCPath.
	All interfaces and exports will be enriched with production related metadata for better production support and quality assurance.
GL Integration	The salary cost transfer page will require entry of a reason code and justification comment. There will be an option to upload/store supporting documentation.
	There will be two primary funding entry security roles: "Inputter" with data entry access for home department or campus (based on location preference) and "Approver" with data entry and approval access to home department only.
	SETID will be used to manage campus-specific chartfield configuration.
	Alternate departments will not be configured in UCPath.
	Fund attributes will be sourced from campus financial systems.
	Additional information will be needed on the job data snapshot that indicates whether an employee has been eVerified. This information will prevent excessive inquiries to HR personnel and/or PeopleSoft pages.
	All entries on the Funding Entry page will have a status of "Active."
	A web service to support real-time FAU validation will not be delivered with Wave 1.
	The data dissemination operational data store (DDODS) will be used as the mechanism for delivering labor ledger data to campus locations.
Interfaces	UCPath interfaces will be pushed over an Enterprise Service Bus to accommodate both current and future requirements.

	This strategy will drive down the overall long term cost structure and put in place technology that will support subsequent common administrative system needs.
Payroll	Gap 001: Automatic payroll updates to GL – Not a gap; will be resolved with GL interfaces.
	Gap 004: Student FICA exemption – Not a gap; will be handled with existing interface (SIS-FICA Exempt).
	Gap 005: Ability to flip a deduction from non-taxable to taxable – Not a gap; can be handled with standard PeopleSoft deductions.
	Gap 006: Dues retention – Not a gap; existing PeopleSoft functionality can manage retention schedules, and business process will ensure that deduction end dates are entered at time of separation.
	Gap 009: Time and attendance – An interface will be developed to perform FLSA overtime calculations to alleviate the need for campuses to manually compute overtime and enter it into PeopleSoft.
	Gap 010: Edits in the pre-compute payroll process – Custom reports will be created to prevent overpayments to employees .
	Gap 015: Automated overpayment calculations – Custom reports and systemwide business process will be developed to provide overpayment documentation and repayment plan to employees, including plans that cross calendar years.
	Gap 016: Cap for pre-tax parking deductions – Not a gap; parking/transit pre-tax and post-tax deductions will be addressed by parking interface.
	Gap 022: Auto-derivation of agency fees – Will be added as a PeopleSoft extension.
	Gap 023: Managing tax treaty grosses and limits – Not a gap; will be handled with PeopleSoft and interface to Glacier.
	Gap 033: Employee Self Service to update state income tax withholding – Will be resolved with a PeopleSoft extension.
	Gap 034: Limit direct deposit options – Gap will be resolved with a PeopleSoft extension.
	Gap 035: Paycheck printing customizations – Gap will be resolved with a PeopleSoft extension.
	Gap 036: SAS 115 audit capability for payroll entries – Will be resolved with reporting.
	Gap 037: Union deductions for employees with multiple jobs – An extension will allow union deductions to be taken against earnings for represented position.
	Gap 038: Postive pay file – Not a gap; will be handled by two interfaces.
	Gap 039: Retroactive title code change – Will be resolved with business process and custom reports.
	Gap 040: Direct deposit for non-net pay – Not a gap; can be accommodated with delivered functionality.
	Gap 049: Pre-distribution payroll audit reports – Gap will be resolved with customized reporting.
	Gap 074: Accrual rules for biweekly pay periods that straddle months – Will be resolved via configuration.
	Gap 076: Retro pay FSLA rate – Not a gap; functionality exists in PeopleSoft.
	Gap 077: Retro benefit and general deductions – Will be addressed with a new business process.
	Gap 084: Designate primary pay group when employee has multiple jobs – This gap will be rolled into Benefits Gap 024 and addressed with an extension.
	Gap 089: Presheet audit report display – A custom report will be developed.

Payroll, con'd	Gap 107: New payroll data staging tables – An extension will be investigated.
Position Management	UC will implement full use of Position Management.
Technology	Legacy interfaces currently include some protected information (e.g., SSN) and will be remediated as part of the project. The UCPath project team has drafted design guidelines that incorporate UC Security Policies related to Personally Identifiable Information (PII), Restricted Information and Personal Health Information.
	Use of Master Data Management, Enterprise Service Bus, and Oracle IDM tools will be limited to UCPath usage until after Wave 3 go live.
	s/FTP services will be managed by paired key certificates; directory username/password management will be deprecated.
	Shared Technology Services will be the only team authorized to communicate directly with the hosting services vendor.
Workforce Administration	Gap 013: Ability to store academic units – Not a gap; will be resolved with known interface.
	Gap 024: Rollup of multiple appointments to primary for benefits eligibility purposes – Will be resolved by an extension.
	Gap 026: Modify label name of address on Personal Data – Label name will not be modified.
	Gap 027: Handling off or above scale salaries – Not a gap; will be handled using delivered functionality.
	Gap 028: Save edit on Appt End Date – To be resolved with report or modification.
	Gap 029: Employee Relations Code – A simple extension will create a custom field for this code.
	Gap 030: "Single" employee names and employee names longer than 30 characters – Will be handled by exception via business process.
	Gap 032: Default standard job group by location – An extension will allow campus-specific EEO job groups. The EEO Job Group will be added to Position Data.
	Gap 046: Employee disclosures – An extension will allow employees to authorize release of personal information.
	Gap 054: Add campus location – An extension will allow a custom translation field to HR business unit, providing flexibility and avoiding the need to hard code business unit data in interfaces. (This gap was subsequently voided by the decision to use PeopleSoft's HR business unit as a location identifier.)
	Gap 055: Add CTO category to Title Code – Not a gap; will be handled by delivered functionality in configuration.
	Gap 056: Add field for SMG – Not a gap; to be addressed by delivered PeopleSoft fields and configuration.
	Gap 057: Non-payroll compensation reporting – Not a gap; will be addressed by business process.
	Gap 068: 2088 annual work hours – A simple extension will allow UC to continue using 2088 annual work hours until all locations have implemented UCPath.
	Gap 069: Department code table – An extension will allow tracking of department types.
	Gap 070: Additional information on Person Organization Summary – Will be resolved with an extension.
	Gap 071: Add a custom UC ID table – This table will be added via an extension.
	Gap 072: Add status data to Person Checklist – Will be resolved with an extension.
	Gap 073: Birthdate warning if entered date shows employee less than 18 years old – Will address using current employment business process of requiring a work permit for employees less than 18 years old.

Workforce Administration, con'd	Gap 080: Notification that E-Verify is needed – A custom table and custom report will be created to meet this need.
	Gap 086: Workflow for licensure and certification verification – This gap will be addressed through business process.
	Gap 087: Action Reason Combination Edits – Will be addressed as part of UCPath Center staff training.
	Gap 090: Academic Comp Group – An extension will add this information to the job code table.
	Gap 091: Add UC Job Data Page – A simple extension will tracking of information (e.g., probabation code and end date) at the appointment level.
	Gap 095: Job data search – An extension will be developed to expand the information displayed in search results.
	Gap 097: Add custom table for shift and on-call rates – A custom page will be added for this information as an extension.
	Gap 101: Add training code to Position data – A simple extension will be created to add this information.
	Gap 108: Make Employee Class a required field - A simple extension will make this change.
	Gap 109: Ability to select salary plan/grade/step - Will be addressed with an extension.