# AGENDA

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
<th>Time</th>
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<tbody>
<tr>
<td>1. UCPath: Overview and Impact on UCSF</td>
<td>Lori Cripps Assistant Controller</td>
<td>8:30 – 9:15 a.m.</td>
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<tr>
<td>2. Setting Topics and Agendas for 2020</td>
<td>All</td>
<td>9:15 – 10:00 a.m.</td>
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Meetings are on the 2nd Tuesday of each month.

**2020 Meetings:**
- January 14
- February 11
- March 10
- April 14
- May 12
- June 9
- July 14
- August 11
- September 8
- October 13
- November 10
- December 8
1. **UCPath: Overview and Impact on UCSF**

   Lori Cripps

UCPath, an acronym for the UC Payroll, Academic Personnel, Timekeeping and Human Resources is a systemwide project, mandated by UC, and must go live by 6/1/20. The 6/1 implementation date poses challenges: budget season, fiscal year-end, academic renewals. UCPath replaces an 11-year old payroll, benefits, and human resource information system. It replaces much of the AYSO functionality and will be used by 200,000 UC employees. Anyone receiving a UC paycheck is impacted. Additional time is set for testing and stakeholder engagement in order to ensure integration. Town Hall meetings are focused on managers and employees and a UCPath Bridge Center will provide support.

Selected specific functionality changes:

- **Employees** will continue to use Huntington Business Systems (HBS) for timesheets and leave requests/recording, however, UCPath will replace HBS as the system of record for accruing leave. **UCPath** will replace **PPS** for processing Payroll. Paychecks and earnings statements will be distributed by the UCPath Center and mailed on payday to the employee’s home address.

- **Managers and supervisors** will continue to use HBS to approve timesheets and leave requests, and continue using **PeopleConnect** to initiate new hires and Management Actions.

- **Department Administrators** Campus funding entry processes will be performed at the local Department level. **UCPath** Salary Cost Transfer (SCT) process will replace the use of the Payroll Expense Transfer Uploader (PETU) and related processes. **Initiator and approver** roles will be set up in for the (SCT) processes as self—approving authority will no longer be allowed. UCPath will replace the use of the Payroll Expense Transfer Uploader (PETU). **UCPath** will enable departments to perform Funding Entry and Salary Cost Transfer functions.

Other changes/impacts:

- Staff will get 2 W-2 forms
- W-4 forms cannot be processed until February 2010 due to necessary configuration changes
- Supervisors can monitor employee’s progress in training sessions

A network of 180 campus Change Agents will disseminate information to the campus; the Health System Change Agent Network is being built-up. Change Agents will offer personalized communications and provide information to help people prepare for the June implementation. Key Stakeholders will receive training. Much support will be available post-implementation. **Ongoing training, including learning labs upon go-live, to help users navigate new tools and processes.** Monthly systemwide calls provide the opportunity to learn from other campus implementations.
If a person receives pay via the UCSF Payroll System, Composite Benefit Rates (CBRs) affect them. There was much discussion on CBRs.

Action: Mike Clune, Senior Associate Vice Chancellor and Chief Financial Officer will attend the February meeting to discuss CBRs: Definitions and Impact.

2. Setting Topics and Agendas for 2020
   Discussion deferred due to time constraints

**Excerpted from PowerPoint; See PowerPoint for details.**
UCPath Overview
Research Advisory Board (RAB)

Lori Cripps, Assistant Controller
UCPath Change Leader

January 14, 2020
Agenda

- What is UCPath?
- How will UCPath impact UCSF?
- Change Management Overview
What is UCPath?

UCPath is an acronym for:

UC Payroll, Academic Personnel, Timekeeping and Human Resources

Replacing 11 versions of a 40+ year old system

The largest administrative project in UC history

A single solution for payroll, benefits, and human resource information

For over 200,000 UC employees
Project Update

UCSF goes live on June 1, 2020.

- Additional time to ensure implementation readiness
  - Further testing of data conversions and system integration
  - Integration of new system enhancements
  - Time for additional stakeholder engagement, including town halls across campus and UCSF Health
  - Implementation of new support model, including new UCPath Bridge Center during initial transition
Project Update

UCSF goes live on June 1, 2020.

Why was June 1, 2020 selected?
- Mandated project completion by June 30, 2020
- Coordination with OP and other campuses going live
- Challenges with new date:
  - Budget season
  - Fiscal year-end
  - Academic renewals
UCSF Goes Live June 1, 2020

System-Wide Implementation Schedule*

In Production
- UCOP
- Riverside
- UCLA & ASUCLA
- Merced

~139,000 Employees

December 2019
- Santa Barbara
- Berkeley
- Davis
- ANR

~ 28,000 Employees

February 2020
- Irvine
- Santa Cruz

~ 500 Employees

June 2020
- Hastings
- UCSF
- San Diego

~ 63,500 Employees

*TBD: LBNL
How will UCPath impact UCSF?
Who at UCSF is Impacted by UCPath?

- All 28,000 Employees*
- All Managers and Supervisors
- Department Administrators
- Reporting Users
- Central HR, IT and Finance Units

*Source: PPS Headcount, 2019Q3
Employee Change Impacts
Highlights for all UCSF Employees

- Employees will continue to use Huntington Business Systems (HBS) to submit timesheets and to request and record leave.
  - UCPath will replace HBS as the system of record for accruing leave.
- UCPath will replace PPS for processing Payroll.
  - Paychecks and earnings statements will have a new look.
  - Paper paychecks will be distributed by the UCPath Center and mailed on payday to the employee’s home address.
- UCPath online will replace most functionality of At Your Service Online (AYSO).

For more in-depth information, visit ucpath.ucsf.edu.
Manager & Supervisor Change Impacts

Highlights for Campus Managers & Supervisors

- Managers and supervisors will continue to use **Huntington Business Systems (HBS)** to approve timesheets and leave requests.
- Managers and supervisors will continue using **PeopleConnect** to initiate new hires and Management Actions.
- Enterprise reports will be changing, and managers and supervisors can review information about employees who report to them in **UCPath online**.

For more in-depth information, visit **ucpath.ucsf.edu**.
Department Administrator Change Impacts

Highlights for Campus Department Administrators

- **UCPath** introduces new concepts, terminology, and data structures.
- All but the *Funding Change* Management Action will continue to be initiated and approved using **PeopleConnect**.
- Campus funding entry processes will be streamlined using **UCPath** and performed at the local Department level.
- **UCPath** Salary Cost Transfer (SCT) process will replace the use of the Payroll Expense Transfer Uploader (PETU) and related processes.
- **UCPath** *Initiator* and *Approver* roles will be established for each campus department to perform Funding Entry and Salary Cost Transfer functions.
- Enterprise reports will be changing to reflect **UCPath** data changes.

For more in-depth information, visit [ucpath.ucsf.edu](http://ucpath.ucsf.edu).
Change Management Plan
Engagement & Communication Strategy

Guiding Principle

Deliver the **right** message
to the **right** audience
at the **right** time
from the **right** messenger
through the **right** channel.
ucpath.ucsf.edu
Central information resource for UCPath at UCSF
The Change Agent Network

Why do we need a Change Agent Network?

Change Agents:

- Help bridge the communication gap from a few participants to everyone across UCSF
- Personalize connections to UCPath by delivering information from a trusted local source
- Provide invaluable feedback on implementation readiness at the department level

Find your Change Agent at ucpath.ucsf.edu.
Change Agent Network: Approach

Network meeting format:
- Knowledge transfer sessions to share what’s changing and how to prepare
- Sessions focus on implementation readiness for key groups
- C.A.N. meetings are not training

Typical toolkit items:
- Change Agent Network meeting presentations
- C.A.N. session recordings
- Posters and fact sheets to share with colleagues
- Schedules of upcoming events, including future training schedules

Recommended actions shared at each meeting:
- Share relevant information at local level
- Distribute and post information locally
- Provide feedback on local change readiness
# UCSF-Wide Training by Key Stakeholder Group

<table>
<thead>
<tr>
<th>Stakeholder Group</th>
<th>Campus</th>
<th>Health</th>
<th>Details</th>
<th>Training Methods</th>
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**Training Methods:**
- Job Aids / Online Help
- Self-Paced eLearning
- Classroom Training
- Labs
UCPath Change Management Timeline

Communications
- ucpath.ucsf.edu Launch: 9/17/2019
- Initial Communication: 11/15/2019
- Get Ready for UCPath: 3/1/2020
- UCPath is Live: 6/1/2020

Campus Change Agent Network Meetings
- Kick-Off: 9/10 & 9/17
- Focus: Department Administrators: 10/16/2019
- Focus: Managers & Supervisors
- Focus: All Employees
- Focus: Reporting
- Focus: Final Reminders
- Focus: Post Go-Live Support

UCSF Health Change Agent Network Meetings
- Call for Health Change Agents: 1/8/2020 - 1/31/2020
- UCSF Health Change Agent Kick Off: 3/11/2020
- UCSF Health Change Agent Network Meeting: 4/8/2020

Town Halls
- UCSF Health Manager & Supervisor Town Hall: 2/26/2020
- Campus Manager & Supervisor Town Halls: 3/10/2020 - 3/31/2020
- All Employee Town Halls: 4/13/2020 - 5/22/2020

Training
- Web-based training for Managers, All Employees: Begins mid March
- Classroom training for Funding Entry, Salary Cost Transfers: Begins 4/1/2020
Implementation Readiness

How should the research community prepare for the new process?

- Current MPM users were invited to attend a webinar on January 13 to learn more about the retirement of MPM.
- Control Point Financial Officers are leading the effort to identify who will be assigned the new Funding Entry and Salary Cost Transfer roles in UCPath.
  - Future users will be notified and assigned training in the Learning Center in March 2020.
  - Classroom training will begin in April 2020.
- Additional guidance, including the cutover plan and blackout periods, will be provided in the coming months from the UCPath project, Human Resources, and the Controller’s Office.
- Visit the UCPath website and sign up for the UCPath listserv to stay informed.
Post-Implementation Support

How will the UCSF community be supported during the transition to UCPath?

- Using lessons learned from other campus deployments, UCSF is in the process of establishing a centralized support model to assist employees and departments with the transition to UCPath.

- The **UCPath Bridge Center** will bring together a cross-functional team from human resources, finance, and information technology to provide a single point of contact for support issues related to UCPath.
  - Streamlined process to report and quickly resolve pay-impacting issues.
  - Phone, email, chat, and drop-in sites to assist employees with accessing UCPath online, reviewing earnings statements, and updating information in UCPath online.
  - Support for departments performing tasks in new system, including funding entry and salary cost transfers.

- Ongoing training, including learning labs upon go-live, to help users navigate new tools and processes.
Questions?