

# Time Reporting System Migration Information

## Accounting & Financial Services

# Agenda

- UCPath/Time & Attendance Overview
- TRS Overview
- Planned Enhancements
- UCPath Modifications
- System Features
  - Brief demo of basic functions
- TRS Implementation/Training

# UCPath Overview

“Path” is an acronym for “Payroll, Academic Personnel, Timekeeping and HR.” UCPath is UC’s new PeopleSoft payroll and human resources information system, replacing the 30-year old PPS system. The project includes replacing PPS with UCPath and implementing more effective and efficient ways to deliver payroll and human resources services to UC employees.

It is one of the most complex operational projects ever undertaken at the University.

UC recognizes that its payroll and human resources processes can be greatly streamlined and standardized across locations, resulting in more efficient operations and higher quality of service to employees. The project encompasses three main areas:

- Implement enabling technology (Oracle PeopleSoft HCMS - UCPath System)
- Streamline and standardize business processes
- Centralize transactional activities (UCPath Center)

# PPS Replacement

PPS is over 30 years old and no longer meets evolving operational needs of the University.

- The limitations of PPS create redundancies and process inefficiencies systemwide.
- There are 11 different variations of PPS in use today throughout the University supporting 90,000 employees
- Local customizations have made system updates and maintenance difficult

# UCPath Implementation

Implementation planning began in September 2011. The project is now wrapping up the business process design phase and beginning development of interfaces. UCPath implementation will take place with a staged rollout to campuses and medical centers over a three-year period. The first wave of rollouts will begin in July 2014. UC Davis is in Wave 2.

Implementing the entire UCPath System will require modules to be implemented in distinct phases. The entire system-wide project will occur over three phases, spanning four years.

When all three phases of the project are complete, UC will have one single, university-wide system for processing payroll and capturing human resources information across all ten campuses and five medical centers—meeting the core needs of each location while gaining cost savings, work flow efficiencies, and improved data reporting.

<http://workingsmarter.universityofcalifornia.edu/projects/ucpath/overview/>

# UCPath Standardization

- The recent Biweekly Payroll Conversion is part of UCPath standardization.
  - Goal is to achieve common business processes in preparation of UCPath at all UC locations.
  - It reflects more efficient and effective time reporting.
  - It reduces manual payroll adjustments and overpayments.

## Other Examples:

- Sunday – Saturday standard workweek for UC employees.
- 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
- UCPath Center: Customer Service and Operational Support roles responsible for UC systemwide Workforce Administration, Payroll Administration and Benefits Administration. When campus are rolled into UCPath, they will be clients of the UCPath Center. Processes will be standardized and consistent across all UC locations.
- <http://ucpath.ucdavis.edu/docs/UCPathOverview.pdf>

# UCPath Time & Attendance

UCPath Project analysis revealed a significant system-wide challenge with Time and Attendance management. As a result, a PPS project sub-group was tasked with selecting a solution from among existing (or under development) campus systems, that could be rolled out to interested campuses.

The selection process determined that UC Irvine's Time Reporting System (TRS) ranked the highest based on available functionality, time to deployment and scalability.

TRS will be the only campus time reporting system which will directly interface with UCPath. The Health System and Vet Med Teaching Hospital solutions have been granted an exception by UCPath Executive Sponsors.

# TRS Implementations

TRS is now a collaboration between UC Irvine, UC Los Angeles, and UC Davis. Other campuses have expressed interest in joining the project.

- UCI
  - Spring 2010: Phase 1 – Biweekly
  - Winter 2010: Phase 2 – Monthly non-represented
  - Fall 2011: Phase 3 – Represented employees
  - 8,000 users anticipated
- UCLA
  - March 2012
  - Includes UC Office of the President
  - 12,000 users anticipated
- UCD
  - March 2012
  - 14,000 users anticipated

# UC TRS Collaboration

As part of the collaboration effort, two workgroups were established to discuss system changes and enhancements. Members include all three campuses.

## Functional Workgroup (Payroll and HR Functional SMEs)

- Establish and share business process solutions to meet system gaps that will not be addressed by programming effort
- Discuss modifications needed to support UCPath
- Discuss/review mandates, policies and bargaining unit agreements which require TRS modifications
- Review any enhancements that a campus intends to build and contribute to the common TRS code base

## Technical Workgroup (Technical Leads and Developers)

- Review open technical issues including bugs and approved enhancements, and explore opportunities for code quality improvement
- Provide development estimates for approved enhancements, reported bugs and policy required code changes
- Establish design, development, unit testing and code review processes
- Establish code contribution/merge procedures
- Provide technical feasibility analysis for proposed enhancements when requested by the Functional Work Group

# TRS Overview

## Eligible Employees/Assignments

- Monthly, exempt, exception paid
  - 99: Non-represented (including GSRs)
  - FX: Research and Allied Professionals
  - LX: Professional Librarians
- Bi-weekly, non-exempt, positive paid
  - 99: Non-represented
  - CX: Clerical and Allied Services
  - EX: Patient Care Technical
  - HX: Residual Health Care Professionals
  - NX: Registered Nurses
  - RX: Research Support Professionals
  - SX: Service Unit (except Custodians)
  - TX: Technical Unit
  - K3: Skilled Crafts
- DOS codes:
  - Currently, only distributions with REG or SDF DOS codes are supported (loaded in the system)
  - OTS, OTP, OTH, ODH, and other overtime DOS codes are generated in the system and sent to OPTRS

# TRS Overview

## Ineligible Employees/Assignments

- Monthly, Positive Paid (Time Reporting Code Z)
- Biweekly, Exception (Time Reporting Code R)
- Biweekly, Exempt
- Title Units Codes:
  - 87: Indeterminate (Stipend/Differential Pay)
  - A3: Academic Senate
  - BX: Academic Student Employees
    - UC TRS Functional Team waiting for UCPath Standardization decision for Readers/Tutors
  - IX: Non-Academic Senate Instructional
  - PX: Postdoctoral Scholars
  - FF: Fire Fighters
  - PA: Police Officers
- Employees with multiple assignments which have different overtime and holiday pay policies.
- Non- REG, WDF and NDF DOS codes
  - UCPath will have standardized codes

# Planned Enhancements

UC Davis recognized there were gaps between TRS. The following are planned enhancements to the current version of TRS:

- Night and Weekend Shift Differential Calculations: TRS was originally programmed for SDF which is only used at UCI.
- Skilled Craft Overtime Calculations: Certain K3 title codes include specific leave types in weekly OT calculation.
- Mass work schedules uploads: SX and EX employees a require a work schedule in the system (needed for daily OT calculations). Add ability for DTAs to upload mass changes via the user interface.
- Supervisor Initiated timesheets: UCI is added functionality to allow supervisors to initiate timesheets for employees.

# TRS Modifications for UCPath

Modifications to TRS will be needed to support UCPath. The UC TRS Functional Workgroup is meeting to discuss/define functional requirements including the incorporation of collective bargaining unit agreements as well as any mandates required by the project, collective bargaining units, federal, state and UC policies.

- One-Time Payments
- Time On Call/Call Back
- Updates to OT/Holiday Pay calculations
- Multiple collective bargaining unit policies per employee
- Standardized Earning Codes (DOS Codes)
- User Interface changes
- Technical changes needed to interact with UCPath
- Other functionality as needed

Note: There are still decisions required by the UCPath Project regarding employees currently not in scope in order for the UC TRS team to identify system modifications

# TRS Features

- Supports represented employees, with integrated contract-specific work rules. Collective bargaining unit agreement changes updated in TRS.
- Automatically calculates overtime, evening shift differential and holiday hours.
- Automated employee/assignment loading based on information entered in PPS (from PPS Data Warehouse)
  - Each eligible appointment is an assignment; timesheets generated for each assignment
- Directly integrated with PPS-OPTRS, using real-time UCOP TRS web service
- Validation against Federal and State laws and UC time reporting business rules.
- Workflow from timesheet initiation to PPS Update, with date and time stamp
- Email notifications
  - Employee
  - Supervisor
  - DTA

# User Roles

## TRS functionality is structured around four user roles.

- **Employee:** Employee may access the system from anywhere, including via a smart phone. The employee can enter current timesheets, overdue timesheets and even create a past pay period timesheet (e.g., after returning from an extended absence).
- **Supervisor:** Supervisors may approve timesheets as either Primary Supervisor or as the Backup Supervisor. A supervisor may return a timesheet to an employee for correction or edit a timesheet before submission. All changes to a timesheet are logged and require comment.
- **Departmental Time Administrator (DTA):** The DTA has a variety of tools for reviewing and submitting timesheets. One of the key roles of the DTA is to review and electronically submit timesheets to the OPTRS IDTC Roster via UCOP's web service. Another is to assign primary and backup supervisors.
- **Central Payroll Services Team:** The team provides training and controls access to TRS. Provides troubleshooting and exception assistance. Responsible for maintaining TRS to ensure up-to-date policy information and collective bargaining updates, etc.

# Time Reporting & Emails

## Timesheet Entry

- Biweekly Employees
  - Time In and Time Out hours required.
    - FLSA required; also used in calculations of OT and shift differential.
- Monthly Employees
  - Leave reporting in full month arrears

## Email Notifications

- Employees
  - Timesheet Due
  - Timesheet Late
  - Returned From Supervisor
  - Modified By Supervisor
  - Approved By Supervisor
- Supervisors:
  - Supervisor Approval Due Date
  - Recalled By Employee
  - Returned From DTA

# Basic DTA Overview

- **Manage Employees**
  - Add/Update Supervisors
  - Add/Update Overtime Compensation Preferences
  - Add/Update Work Schedules
  - Add/Update Timesheet Identifiers
- **Review/Submit Payroll**
  - Submit timesheets to PPS
  - Notified to make Manual Adjustments in OPTRS
- **Work Study**
  - Two Appointments Required
    - One for Work Study distribution
    - One for non-Work Study distribution

# TRS Migration

## What is needed to start using the system?

### **DTA Training**

- Mandatory
- OPTRS Access prerequisite

### **System Configuration**

- Supervisor Assignments
  - Primary (required)
  - Secondary (required; cannot be DTA)
  - Optional Backup (cannot be DTA)
- Overtime Compensation Preferences (non-exempt only)
- Work Schedules (non-exempt only; required for SX and EX employees)
- Timesheet identifiers (optional)
  - 15 Characters
  - Recommended for work study appointments
  - Employees with multiple assignments

# Implementation Assistance

A&FS offers an optional initial data loading service to assist with implementation. We recommend all units to take advantage of the process.

## **Implementation Data:**

- Supervisor assignments
- Overtime Compensation Method
- Timesheet identifiers
- Work Schedules (non-exempt - required for SX and EX)

Spreadsheet templates are available on the project implementation website:  
[http://accounting.ucdavis.edu/projects/Time\\_Reporting\\_System/transition\\_info/index.cfm](http://accounting.ucdavis.edu/projects/Time_Reporting_System/transition_info/index.cfm)

To avoid receiving email notifications from both OLTS and TRS, an implementation data loading schedule has been established. The schedule includes file submission deadlines for each pay period as well as when data is loaded into TRS.

# Implementation Schedule

## IMPLEMENTATION SCHEDULE

Below is the TRS implementation schedule. The due dates are fixed because of time sensitive deadlines and the file preparation time. Please make sure files are sent by the indicated deadlines.

Implementation Pay Period	Files Due to A&FS Date (5:00pm)*	Data Loaded in TRS Date (after 5pm)**
March (MO Employees Only)	3/1/2013	3/12/2013
03/03/13 - 03/16/13	2/15/2013	3/5/2013
03/17/13 - 03/30/13	3/1/2013	3/19/2013
April (MO Employees Only)	4/1/2013	4/10/2013
03/31/13 - 04/13/13	3/15/2013	4/2/2013
04/14/13 - 04/27/13	3/28/2013	4/16/2013
May (MO Employees Only)	5/1/2013	5/10/2013
04/28/13 - 05/11/13	4/12/2013	4/30/2013
05/12/13 - 05/25/13	4/26/2013	5/14/2013
June (MO Employees Only)	6/1/2013	6/12/2013
06/09/13 - 06/22/13	5/24/2013	6/11/2013

\*If deadline is missed then group will automatically be rolled over into the next implementation pay period. No exceptions.

\*\*Employees will not be able to save/submit timesheets in TRS until the data is loaded into system.

Once OLTS will be shut down on 6/30/2013, the schedule will change for pay periods after the June MO and 6/9/2013 – 6/22/2013 BW pay periods.

The new schedule will be available at the beginning of May.

# OLTS MO Timesheets

It is recommended that monthly employees start reporting in TRS for a full month since TRS monthly reporting periods are full month in arrears. For the last monthly submissions in OLTS please use the below information (applies to exception reporting only).

Implementation Month/Pay Period	OLTS Timesheet reporting period	TRS Employee Due Date
April	OLTS 3/16 – 4/15 pay period: Report March 16 <sup>th</sup> – March 31 <sup>st</sup> time only.	May 3 <sup>rd</sup>
May	OLTS 4/16 – 5/15 pay period: Report April 16 <sup>th</sup> – April 30 <sup>th</sup> time only.	June 4 <sup>th</sup>
June	OLTS 5/16 – 6/15 pay period ( <b>this is the LAST OLTS pay period</b> ): Report May 16 <sup>th</sup> – May 31 <sup>st</sup> time only.	July 3 <sup>rd</sup>
July	OLTS no longer available.	August 5 <sup>th</sup>

# OLTS BW Timesheets/Misc

The last OLTS BW pay period will be 6/9/2013 – 6/22/2013 (B2) but the L&S Application Development Team recommends the last BW pay period in OLTS be the 5/26/2013 – 6/8/2013 pay period.

Units should not be disabling timesheets. Instead, they should be deleting the employee from the "Staff Management" page after they have finished processing the last timesheet that will be entered into the L&S Online Timesheet System.

TRS does not require BW implementations to begin on a B1 pay cycle. However, there are no TRS implementations for the 5/26/2013 – 6/8/2013 pay period.

Due to the UCPath Holiday Pay Standardization, any non-exempt employee with less than a 100% appointment will need their holiday hours calculated if the two prior BW pay periods are not present in TRS. This will be true for new employees who start reporting their time in a pay period with a holiday.

# Training

## Departmental Time Administrator

- DTA training is required and prior OPTRS access is required.
- Users must complete and submit an Access/Change Application for DTA Access.
- Classes are available in LMS.

## Employee & Supervisor training

- Online training modules are available through LMS.
- Classroom training also available

[http://accounting.ucdavis.edu/projects/Time\\_Reporting\\_System/transition\\_info/training.cfm](http://accounting.ucdavis.edu/projects/Time_Reporting_System/transition_info/training.cfm)

# Support

## – TRS website

- [http://accounting.ucdavis.edu/projects/Time\\_Reporting\\_System/](http://accounting.ucdavis.edu/projects/Time_Reporting_System/)
- Updated system information
- Training information
- Timesheet Deadlines
- Online guides
- FAQs
- Implementation information
- Sign-up for DTA listserv

## – Help Desk Support

- [trshelp@ucdavis.edu](mailto:trshelp@ucdavis.edu)

# Questions