UCLA UCPath

Campus Information Roadshow*

June – July 2018

*Content is subject to change
Agenda

• What is **UCLA UCPATH**...and What it’s Not

• What’s **New & Different** with UCPATH

• Next Steps: **Preparing** for UCPATH

• **Resources** Available to Learn More about UCPATH
What is UCLA UCPath?
What is UCPath?

UCPath is an acronym for UC Payroll, Academic Personnel, Timekeeping, and Human Resources

• University of California’s system-wide initiative to create a single platform for payroll, benefits, and human resources information

• Designed to support payroll and human resources transactions for over 200,000 UC employees

• Employs modern, state-of-the-art PeopleSoft technology to replace the aging 35+ year-old PPS system

• The largest administrative project in UC history

• UCPath is not a Time and Attendance (T&A) system
  – Employees will continue to use their designated T&A system (i.e. Kronos, TRS, HBS, etc.) and follow established procedures by your organization
UCLA will launch UCPath in **September 2018** along with **UC Santa Barbara**

**All UC employees will transition to UCPath**

<table>
<thead>
<tr>
<th>PRODUCTION</th>
<th>UCLA/UCSB</th>
<th>DEPLOYMENT 1</th>
<th>DEPLOYMENT 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 16,326</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Riverside</td>
<td>Los Angeles</td>
<td>49,312</td>
<td>33,533</td>
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<tr>
<td>Merced</td>
<td>Santa Barbara</td>
<td>11,672</td>
<td>27,128</td>
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<tr>
<td>Office of the President</td>
<td>Davis</td>
<td>33,292</td>
<td>8,454</td>
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<td>ASUCLA</td>
<td>Berkley</td>
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<td>3,384</td>
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<td></td>
<td>Irvine</td>
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<td>Hastings 430</td>
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<tr>
<td></td>
<td>ANR</td>
<td>1,454</td>
<td></td>
</tr>
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</table>

**LIVE**

- **TARGET SEP 2018**
- **TARGET MAR 2019**
- **TARGET SEP 2019**
What UCPath Means to UCLA

✓ Offers **integrated**, connected technology
✓ **Centralizes** payroll and HR transactions
✓ **Automates** many manual calculations and processes, reducing errors
✓ Provides **new, expanded functionality**
✓ **Scalable** to support future growth
✓ Helps us achieve **administrative excellence**
What UCPath Means to You

✓ Improved access to your information

✓ More options for receiving your paycheck

✓ Enhanced self-service functionality in the new UCPath Portal

✓ Centralized customer service support through the UCPath Center
I won't get paid on time!

My paycheck will be wrong!

There's nothing wrong with our current system. PPS is just fine!

UCPath Center will not be able to support me or UCLA!

I hear there will be yet ANOTHER DELAY!

UCPath may cause me to lose my job!
What’s **New & Different** with UCPath
What’s New & Different with UCPath

UCPath Center
New shared services center for Payroll, Benefits and HR inquiries and transactions

UCPath Portal
New employee self service portal, replacing AYSO for viewing and managing employee information *

Payroll
- New look and feel to paychecks
- New paper paycheck distribution method
- New process for handling credit union payroll deductions
- Additional Direct Deposit options
- New location for viewing and printing W2s
- New industry-standard deduction and withholding calculations
- Single pay cycle for employees with multiple jobs

Benefits
- UCPath Center services for responding to benefit questions
- New employee self-service portal for Benefits enrollment and managing life event changes (marriage, new baby, etc.)
- New process for claim submissions
- New contact for Open Enrollment assistance

*Exception: Employees will continue to access AYSO for e.g., retirement information, to update beneficiaries, and to access previous years W-2s.
The UCPath Center &
The UCPath Portal
The UCPath Center

• Serves as **shared services hub** for the UC system

• Located in **Riverside, CA**

• Will provide **customer service support** for more than 200,000 UC employees, system-wide

• More than **20% of staff** have previously worked at other UC locations
The UCPath Center (cont.)

• **First point of contact** for questions and matters related to ...
  – Paycheck issues *(e.g. lost checks, over/underpayments, etc.)*
  – Employment verification
  – Deductions and calculations
  – Leave balances
  – Extended absences *(e.g. direct billing)*
  – Benefits billing
  – Overpayment collections
  – FICA processing and corrections

• Contact UCPC via ‘Ask UCPath Center’ button on the Portal, the **UCPC website** or phone the UCPath Center
The UCPath Portal

- **Employee** *self-service portal* replacing AYSO*

- **View, access and update personal information** including:
  - Paycheck
  - Home address, phone, email, etc.
  - Benefits
  - Update life events (*e.g.* marriage, births, etc.)
  - Leave balances (*e.g.* vacation/PTO, sick, etc.)

- Accessible **24/7, mobile-friendly**

- Available **late September**

*Exception: Employees will continue to access AYSO for *e.g.*, retirement information, to update beneficiaries, and to access previous years W-2s.*
Payroll Changes
General Payroll Information

• There will be **no changes to pay dates**. Pay dates will remain the same for monthly and bi-weekly employees.

• The first UCPath-generated check will be received on **October 1** for employees paid monthly, and **October 3** for employees paid bi-weekly.

• Pay statements will still be available **one day before pay day** on the UCPath Portal.
## Paycheck Changes: New Look & Feel

**Contact information** for the UCPath Center

**New UCPath Employee ID number.** *Note:* This ID number will not replace the UID

Earnings will be displayed in **work week increments** (for bi-weekly employees only).

Vacation and sick time usage will be included in ‘Hours and Earnings’ display. Balances will be viewable on the UCPath Portal

**Additional deductions** as elected on W-4s

Before tax and after tax deductions will be displayed separately and will follow a consistent order

Check number, account type, and total amount deposited to bank accounts, with up to the three direct deposit elections

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### UCPath Employee ID Number

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Home</th>
<th>Work</th>
<th>Current Status</th>
<th>Last Name</th>
<th>First Name</th>
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<tbody>
<tr>
<td>UC555555555</td>
<td>UC55</td>
<td>UC55</td>
<td>UC555555555</td>
<td>Smith</td>
<td>John</td>
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### Hours and Earnings

<table>
<thead>
<tr>
<th>Description</th>
<th>Rate</th>
<th>Hours</th>
<th>Earnings</th>
<th>Total Amount</th>
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<tr>
<td>Regular Pay</td>
<td>22:120000</td>
<td>32.00</td>
<td>707.84</td>
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<td>Vacation Leave Used</td>
<td>22:120000</td>
<td>10.00</td>
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<td>384.00</td>
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### Before-Tax Deductions

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<tr>
<th>Description</th>
<th>Current</th>
<th>Total Amount</th>
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</thead>
<tbody>
<tr>
<td>Social Security</td>
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<td>State Tax</td>
<td>80.00</td>
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<td>Federal Income Tax</td>
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<td>Medicare</td>
<td>98.92</td>
<td>1,978.40</td>
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<tr>
<td>Disability</td>
<td>5.18</td>
<td>93.24</td>
</tr>
<tr>
<td>UC Retirement Plan</td>
<td>14.91</td>
<td>298.22</td>
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<tr>
<td>Total Before-Tax Deductions</td>
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<td>5,297.44</td>
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### After-Tax Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>Total Amount</th>
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</thead>
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<tr>
<td>Federal Income Tax</td>
<td>233.12</td>
<td>5,297.44</td>
</tr>
<tr>
<td>Total After-Tax Deductions</td>
<td>233.12</td>
<td>5,297.44</td>
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### Employer Paid Benefits

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Account Number</th>
<th>Account Name</th>
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<tr>
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<td>Checking</td>
<td>10.00</td>
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<tr>
<td>Savings</td>
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<tr>
<td>Checking</td>
<td>XXXXXXXX0000</td>
<td>Checking</td>
<td>1,364.28</td>
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**NET PAY DISTRIBUTION**

<table>
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<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Total</td>
<td>1,364.28</td>
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**Business Unit:** UC Office of President
**Pay Register Date:** 06/12/2017
**Pay End Date:** 06/29/2017
**Advice B:** 0000000000479
**Advice Date:** 06/06/2017

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**UC Path**

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Paper Paycheck Distribution

• Paper paychecks will be mailed to your home address on file, on pay day via the U.S. Postal Service

• Checks will no longer be available for pick-up at the Central Payroll Office or department offices

• Employees should contact the UCPath Center if paper paychecks are not received after 5 days from mailing date

• Employees are strongly discouraged from using campus office addresses due to delays in receiving mail
  – Student workers may continue to use residential addresses as these are served by the US Postal Service. However, they too, are encouraged to sign-up for Direct Deposit or the UC Pay Card
Direct Deposit

- Employees are encouraged to enroll in Direct Deposit prior to the transition to UCPath

- Visit https://atyourserviceonline.ucop.edu/ayso/ to enroll in Direct Deposit by August 1 to ensure your account is set-up prior to go-live
  - If you are currently enrolled in Direct Deposit, you will not need to re-enroll. Your current Direct Deposit will automatically convert over to UCPath

- After go-live, you can elect up to three (3) Direct Deposit accounts at different financial institutions
UC Personalized Pay Card

- **Non-represented employees** can elect to receive their pay via the new **UC Pay Card (No start-up fees)**
  - For **represented employees**, the pay card option may not be available at go-live as it is **subject to collective bargaining**

- Pay card acts like a **debit card** and is **accepted anywhere**
  - Visa-logo cards are accepted

- Cards are issued directly through **ADP** and are **personalized** with the employee’s name

- Pay cards are **reloaded each pay day**

- Employees will need to complete a **consent form** to obtain the card

- **More information** will be available in the coming weeks on the **UCLA UCPath Website**
2018 Benefit Holiday

- Applies to **bi-weekly paid employees only**
- When a Benefit Holiday occurs, there are **no flat dollar deductions withheld from paychecks** (e.g. health insurance, parking, etc.)
- The **Benefit Holiday** that was scheduled for **July 11, 2018** has been moved to the **October 31, 2018** paycheck
- There will be **no impact** to the amount paid for benefits, taxes or earnings for the year
Credit Union Deductions

- University Credit Union (UCU) deductions will no longer be handled as payroll deductions
- If you currently have a credit union deduction, you will need to submit a *Transfer of Payroll Deduction to Direct Deposit Sign-Up Form* authorizing the transition of your deduction to a direct deposit
  - Impacted employees have been notified by mail
- If no action is taken, your full pay will be issued via the regular pay method
- Visit [ucu.org/ucpath](http://ucu.org/ucpath) for more information and to complete the form
If you ...

...Have **Direct Deposit to UCU** and a deduction to UCU, you do not have to take any action

...Have **Direct Deposit to another financial institution and a deduction to UCU**, you must fill out the 'Transfer of Payroll Deduction to Direct Deposit Sign-Up Form'

...Receive a **Paper Paycheck** and have a deduction to UCU, you should:

1) Sign up for **Direct Deposit**, and

2) Fill out the ‘Transfer of Payroll Deduction to Direct Deposit Sign-Up Form’

**Deadline: August 1, 2018**
Calculations and Deductions

• UCPath uses industry-standard, automated calculations for payroll deductions and withholdings

• There may be some minor differences in the rounding of the following calculations:
  – Taxes
  – Voluntary deductions
  – Flexible Spending Accounts (Health and Dependent Care)
You will receive **two (2) W-2s for 2018 earnings:**

- One (1) for earnings *before* UCPath goes live; and
- One (1) for earnings *after* UCPath goes live

W-2s for **wages earned before the UCPath** go-live will be available in **AYSO**, while those W-2s for **wages earned post go-live** will be available in the **UCPath Portal**

- Your designated W-2 delivery option in AYSO will transfer over into UCPath (*i.e. mail or online option*)

Social Security **calculations will not start over** when UCPath goes live (*e.g. OASDI*), but will continue until the employee reaches the maximum contribution
Final Pay

• Separated employees are **not guaranteed** to receive final pay within seventy-two (72) hours

• Pay may be received as part of their **next regular pay date**

• Represented employees will receive **final pay in accordance with their collective bargaining agreement**
Benefit Process Changes
Routine Benefit activities such as welcome kit distribution, enrollment, claims submissions (including life insurance claims) and notifications about benefits will be handled at the UCPath Center.
Benefits Enrollment

- Employees will sign-up for benefits through the UCPath Portal
- During Open Enrollment (OE), benefits elections can be changed daily throughout the OE period
- During the Period of Initial Eligibility (PIE), once benefit elections are submitted, they become final and can only be changed by contacting the UCPath Center
Next Steps: Preparing for UCPath
Take the following the steps before **August 1, 2018** to help you to seamlessly transition to UCPath:

**Step 1:** Establish a **Single Sign-on (SSO)**, if you currently do not have one to access the UCPath Portal. Contact your manager/supervisor for information on obtaining a SSO

Please note: as with all other UCLA websites requiring SSO, **Multi-Factor Authentication (MFA)** will be required. To enroll in MFA, please visit [it.ucla.edu/security/resources/mfa-at-ucla](it.ucla.edu/security/resources/mfa-at-ucla)

**Step 2:** Log into [atyourserviceonline.ucop.edu (AYSO)](atyourserviceonline.ucop.edu) to:

- Verify your **personal information** (i.e. address, phone, email address, dependent names, etc.)
- Sign-up for **Direct Deposit** if you are not currently enrolled

**Step 3:** If you have a payroll deduction to University Credit Union (UCU), complete the **Transfer of Payroll Deduction to Direct Deposit Sign-Up Form** to convert your deduction to a direct deposit account. You can obtain the form by visiting the UCU website at ucu.org/ucpath

**Step 4:** If you are over or nearing the vacation accrual maximum, please work with your manager/supervisor to **reduce your current vacation balance**
Resources Available to You to Learn More about UCPath
To Learn More...

- **Reach out** to your manager or supervisor for more information on UCPath
- **Pick-up** flyers and employee checklist with more information about UCPath and what you can do to prepare for the transition
- **Visit** [ucpath.ucla.edu](http://ucpath.ucla.edu) and [ucpathproject.ucop.edu](http://ucpathproject.ucop.edu) to find out the latest news
- **Check** email for periodic communications on UCPath
- **Stay tuned** for more information on UCLA UCPath!
Thank You!

Visit ucpath.ucla.edu for more information