UCPath Strategic Overview
for
Shared Services Leadership Coalition

May 11, 2023

UNIVERSITY OF CALIFORNIA — UCPath

Who We Are

UCPath is the largest shared service provider in US higher education, and it was created to consolidate multiple legacy payroll, benefits and personnel system instances into a single, cloud-based service delivery platform.

UCPath's singular purpose is to effectively serve the more than 230,000 employees from UC campuses, health systems, Office of the President, Agriculture and Natural Resources, Associated Students of UCLA, Hastings College of the Law and Lawrence Berkeley National Lab.

Mission and Vision

Vision

UCPath will be the premier HR system and payroll shared services provider in US higher education

Mission

UCPath supports the University of California's core mission of teaching, research and public service by providing efficient, responsive and accurate payroll and human resources system services

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By The Numbers

	2021	2022
Gross salaries paid	$19.7B	$22.4B
Health and welfare benefits paid	$2.7B	$2.9B
Payroll taxes paid	$5.7B	$6.2B
Cases resolved	338,273	198,914
Paychecks issued	4,446,521	4,812,166
Employee calls	132,330	109,320
Callbacks	65,120	71,020
Public Service Loan Forgiveness	N/A	35,274
W2s produced	304,075	329,153

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A Little Background
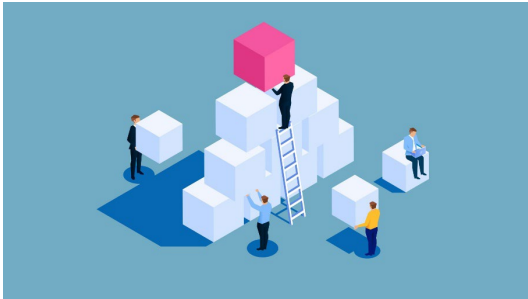
- UCPath is essentially a start-up shared services initiative that was launched in 2011.

- From initial launch until November 2015, UCPath was building the organizational structure, systems, and operational and business processes to begin the first migration of UCOP into the new system.

- After the UCOP migration, UCPath spent the next 2 years hiring and training staff and scaling business processes to manage the migration of all UC locations.
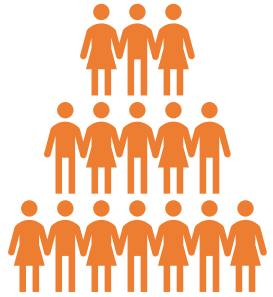
Migration

6-12 months

8 ½ Years

- From January 2018 through July 2020 (2 ½ years), UC migrated 19 locations and more than 230,000 UC employees to UCPath

- The average time to migrate a 10,000-employee organization to a *stable* HR/payroll/benefits platform with an *experienced* workforce ranges from 6 months to more than a year

- Based on this benchmark, it would have taken UC 8 ½ years to migrate these 19 locations in the *best-case scenario*

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The UCPath project was expected to reduce costs by:

- Achieving economies of scale by eliminating duplicative HR and payroll operations at each location.

- Eliminating older legacy HR and payroll systems that were costly to maintain because COBOL expertise was becoming increasingly difficult to recruit and retain.

- Consolidating all HR and payroll processes into a single, modern, cloud-based hosted solution.

- Providing a central repository for all UC employees' HR data and reporting.

- Standardizing HR and payroll functions for the entire UC system.

- Incorporating the latest Oracle/PeopleSoft technology that would be more intuitive and easier to use than the legacy PPS applications.

Some of the current challenges facing UCPath include:

- *Locations' lack of trust in UCPath's ability to deliver on the promises made prior to migration.*

- *Locations' dissatisfaction with their inability to manage their HR and payroll processes as before.*

- *Locations' frustration with UCPath's lack of expertise in handling what they feel are simple issues.*

- *Confusion regarding who handles issues that arise.*

- *Feeling as though UCPath's roadmap does not incorporate the locations' feedback.*

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We are here!

Launch shared services initiative

Migrate all UC locations to UCPath

Stabilize and normalize UCPath operations to achieve service targets and predictable outcomes

Deliver intuitive, scalable, consistent, frictionless and seamless services and economies of scale

Strategic Goals

Goal #1	Stabilize UCPath Operations
Goal #2	Create Value for UCPath Stakeholders
Goal #3	Become an Employer of Choice

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Understanding the 3 Ps

P #1 Processes

P #2 People

P #3 Perception

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Improved Operational Processes

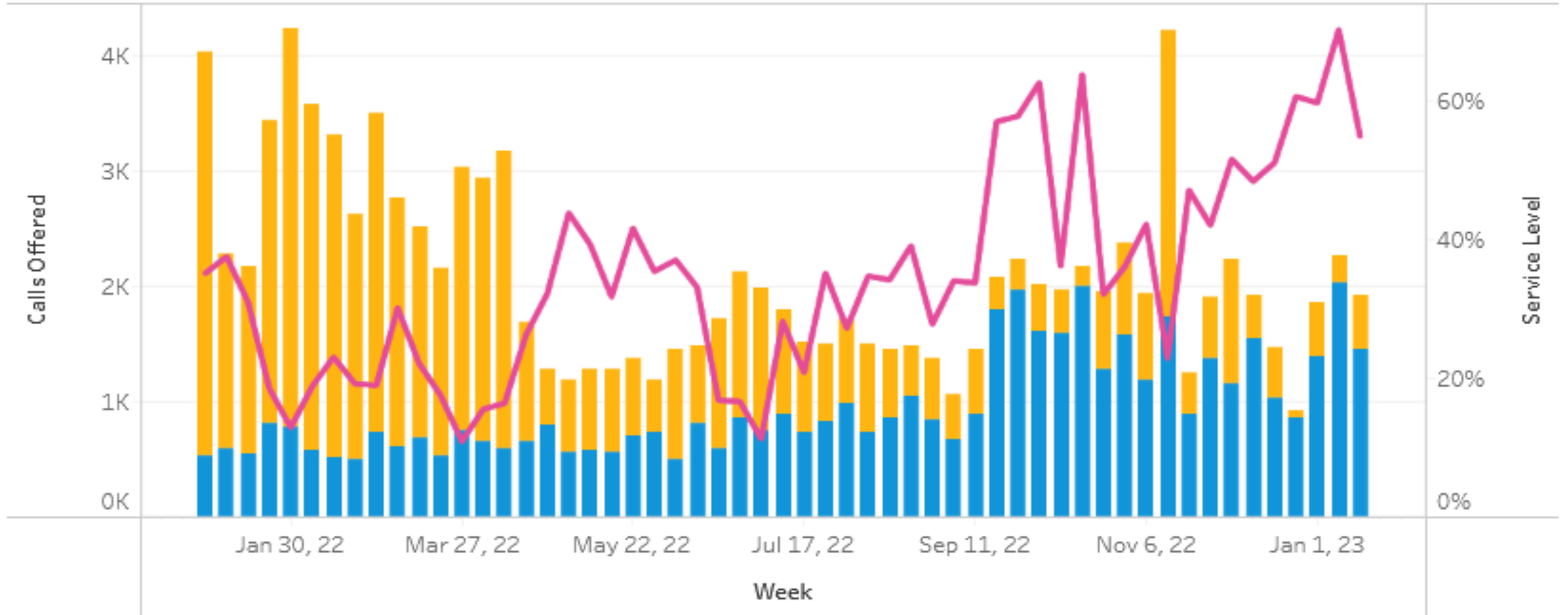# Open Enrollment

	2021	2022	Difference
Number of employees eligible for Open Enrollment	189,465	199,057	5.1%
Total number of benefits enrollment events	51,015	56,920	11.6%
New **Open Cases** generated during Open Enrollment	11,540	9,448	**-18%**
Open Enrollment transactions flagged for reprocessing **during Open Enrollment**	36,562	93,670	156%
Self-Service Open Enrollment applications	56,956	68,125	20%
eBenefits submissions during Open Enrollment	0	2,160	2,160
eBenefits submissions for the entire year	0	11,130	11,130

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Open Enrollment Continued

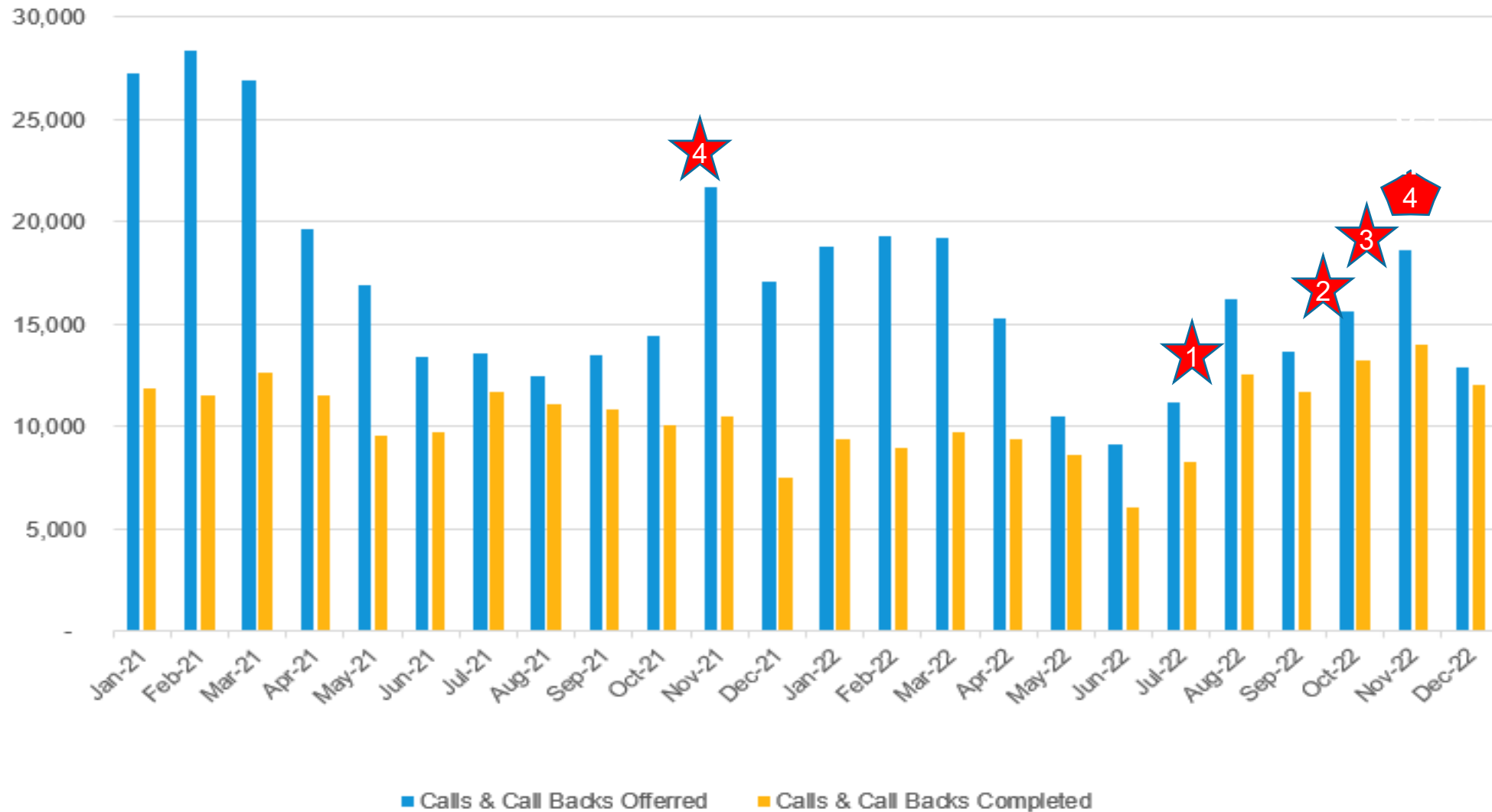|	2021	2022	Difference
Total Calls During Open Enrollment	19,119	18,054	**-6%**
Total Open Enrollment-related Calls	5,624	5,601	0%
Average incoming calls speed to answer	1:10	0:48	**-32%**
Average incoming calls handle time	0:19	0:14	**-25%**
Average incoming abandoned calls	2,081	1,765	**-15%**
Number of calls resolved by Virtual Agent during Open Enrollment	0	2,373	N/A
Number of calls resolved by Virtual Agent since launch in October	0	5,905	N/A

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Call Statistics

Call Volume

Chart legend: ■ Calls & Call Backs Offered ■ Calls & Call Backs Completed
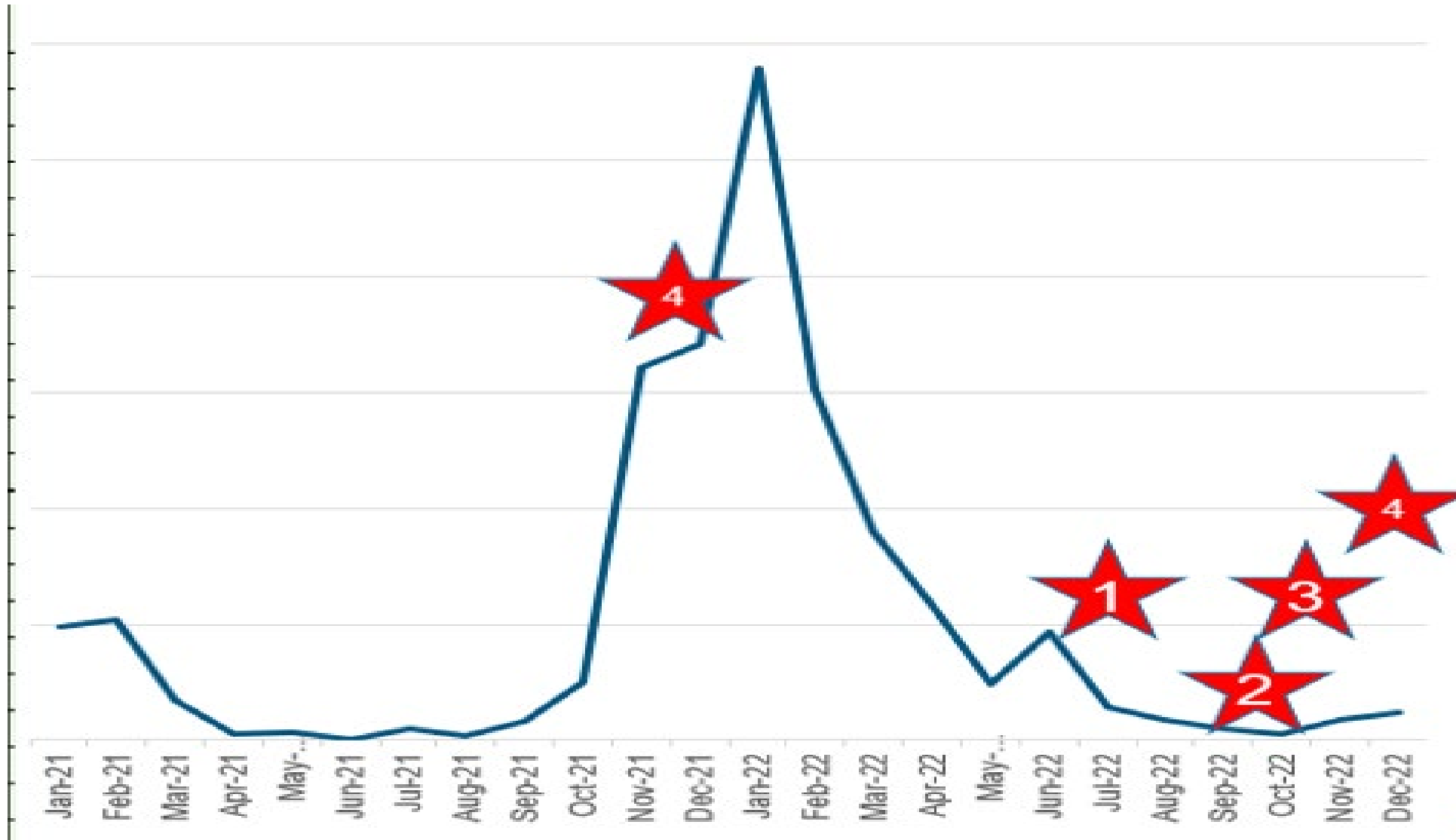
1. CTG Partnership
2. Direct Deposit Verbiage update
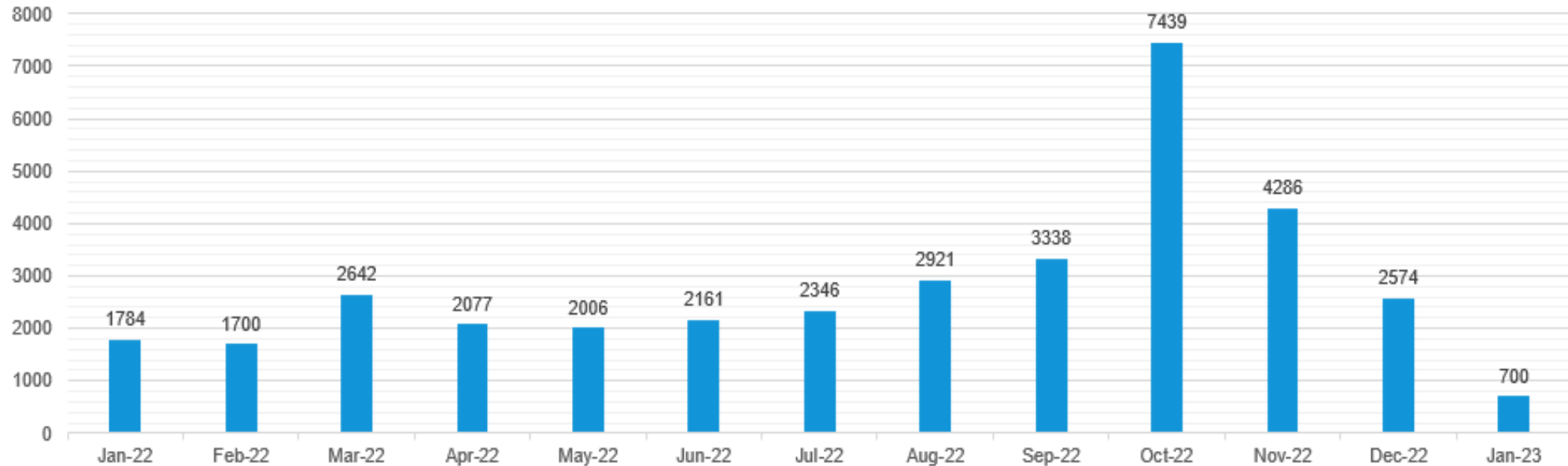3. Virtual Agent Launched
4. Open Enrollment

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Call Wait Times

1. CTG Partnership
2. Direct Deposit Verbiage Update
3. Virtual Agent Launched
4. Open Enrollment

PSLF Cases Handled

CY 2022-23 Resolved PSLF Cases

Month	Cases
Jan-22	1784
Feb-22	1700
Mar-22	2642
Apr-22	2077
May-22	2006
Jun-22	2161
Jul-22	2346
Aug-22	2921
Sep-22	3338
Oct-22	7439
Nov-22	4286
Dec-22	2574
Jan-23	700

- PSLF 2022-23 Resolved = 35,974

- Assigned to Locations = 6,287
  - Phase 1 8/25 – 9/23 = 3,574 (Mass Closed)
  - Phase 2 9/24 – 10/28 = 2,713 (1,039 cases manually closed)
  - No additional reports will be sent to locations
  - UCSF returned 1,177 PSLF cases to UCPath

- UCPath working escalations/follow up cases as requested
  - Daily Capacity = 180 cases per day on average

- Backlog PSLF Cases = 492

Data as of 1/10/2023

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Talkdesk Virtual Agent

Service Description	Processing Totals
Total Virtual Agent Sessions since go-live	9,450
Number of Sessions Routed to Live Agent	8,133
Number of Sessions Resolved by Virtual Agent	1,317
Virtual Agent Effectiveness to date	13.94%

Questions?

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