



UC SANTA CRUZ

Executive Budget Committee Project Status Update

EBC Offsite Project Status Reports

Time & Attendance Slides

December 15, 2003



Time and Attendance

AVCOR:

- Scott Morris

Project Team:

- Y. Lisetha Aranda – SA
- Doug Carlson – Social Sciences
- Jose Gaona – Social Sciences
- Cathy Schoenfeld – BAS
- Teresa Locatelli – Arts
- Don Macangus – BAS
- Peter McMillan – BAS
- Kristin Mott – PBS
- Doug Patten – ITS
- Linda Rhoads – P&B
- Michelle Santos – BAS

Project Status Summary:

Milestone	Status
Review existing service center practices and procedures	Complete
Conduct external best practices review	Complete
Develop an “optimum” high level future-state process	Complete
Author a request for proposal document and release it to vendors	Complete
Review RFP responses and select a set of “candidates”	In progress
Select a primary vendor	On Schedule (Feb)
Blend the designed process with the vendor toolset and technology	On Schedule (Mar)
Create an integration roadmap for existing campus systems	Not started
Create an implementation and roll-out plan	Not started
Begin phased roll-out to selected divisions and units (pilot phase)	Not started



The Current Process

The current process restricts the ability to share information and requires one group to hand-off information to the next group.



The Current Process



Activities:

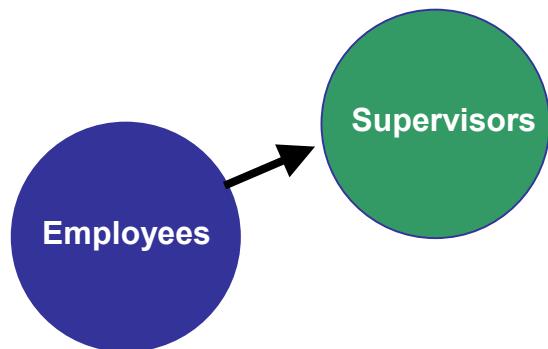
- Enter information onto paper tracking sheets
- Submit information to supervisors on a monthly basis

Issues we are aware of:

- Records are not always submitted by the established deadlines
- Few enforcement mechanisms



The Current Process



Activities:

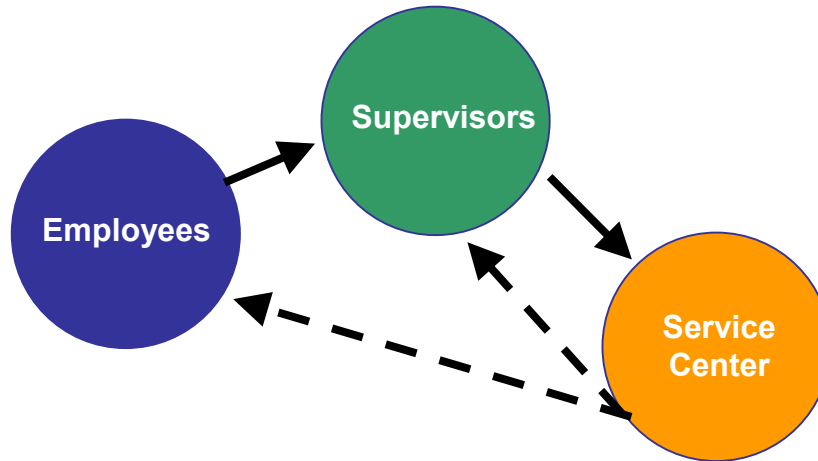
- Approve records submitted by employees
- Review and reconcile employee records and check employee leave balances
- Forward signed timesheets to the service center

Issues we are aware of:

- Records are not always approved and passed forward by the established deadlines
- Overtime expenses are not identified until the end of the month
- Few enforcement mechanisms



The Current Process



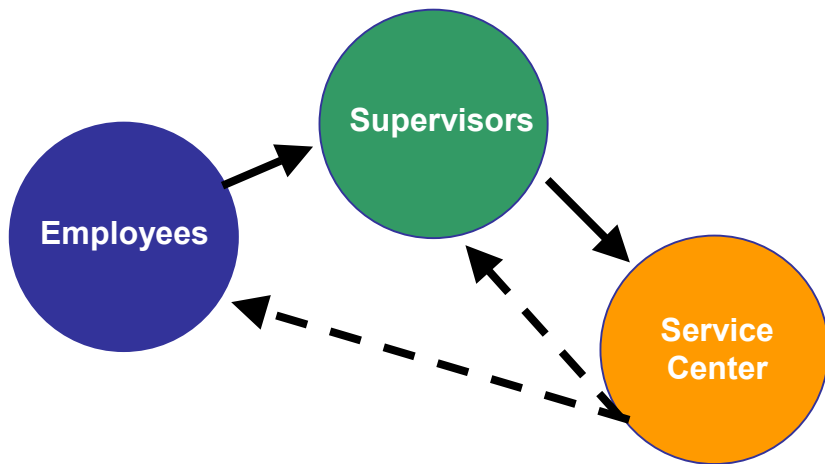
**If there are problems
or if additional info is
needed**

Activities:

- Engage in estimation of time



The Current Process



Activities:

- Engage in estimation of time



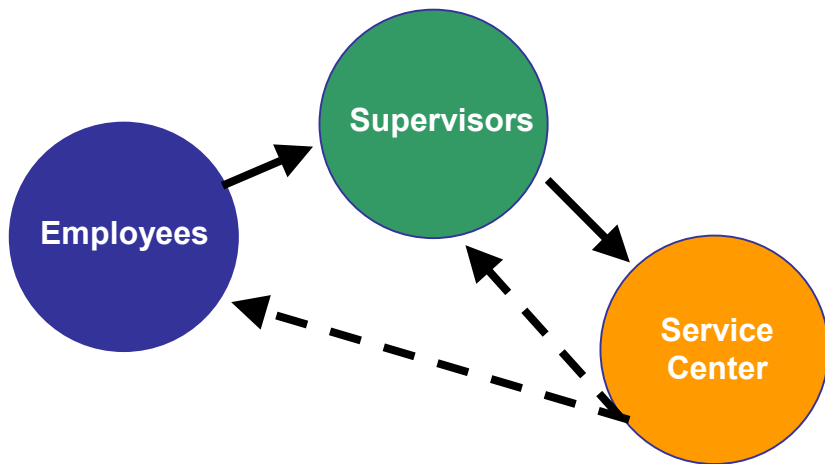
Worst case scenario

S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- If records are due for current month
- Number of days where employee work time is estimated



The Current Process



Activities:

- Engage in estimation of time



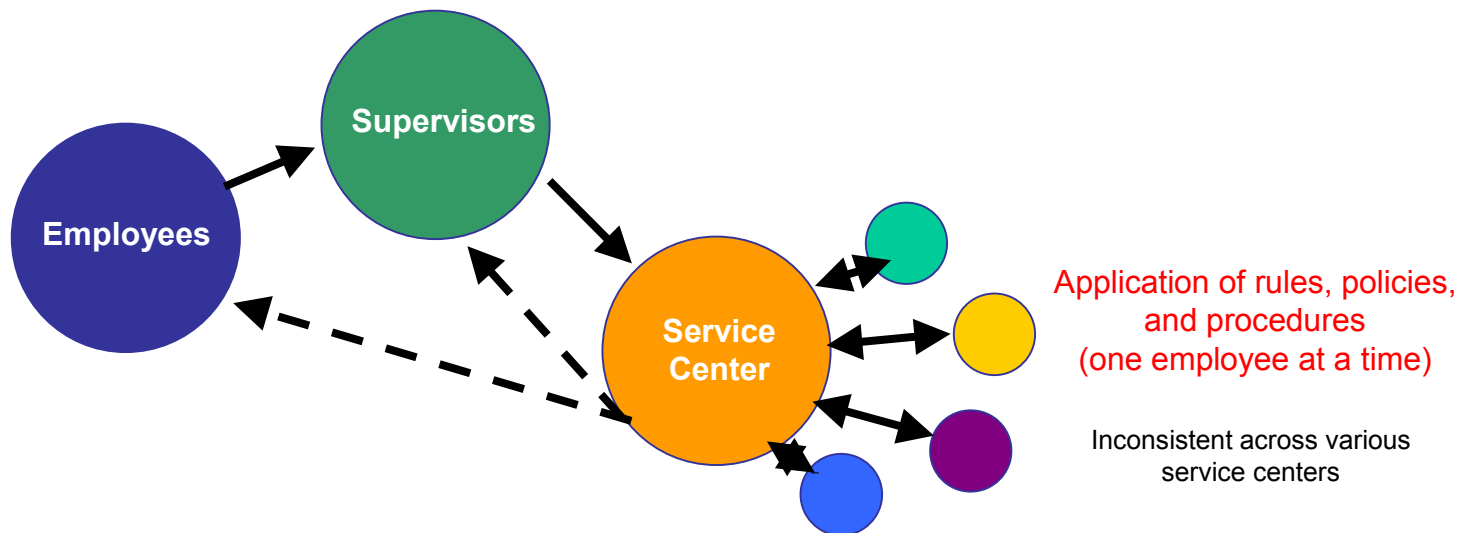
Best case scenario

S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
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- If records are due for current month
- Number of days where employee work time is estimated



The Current Process



Activities:

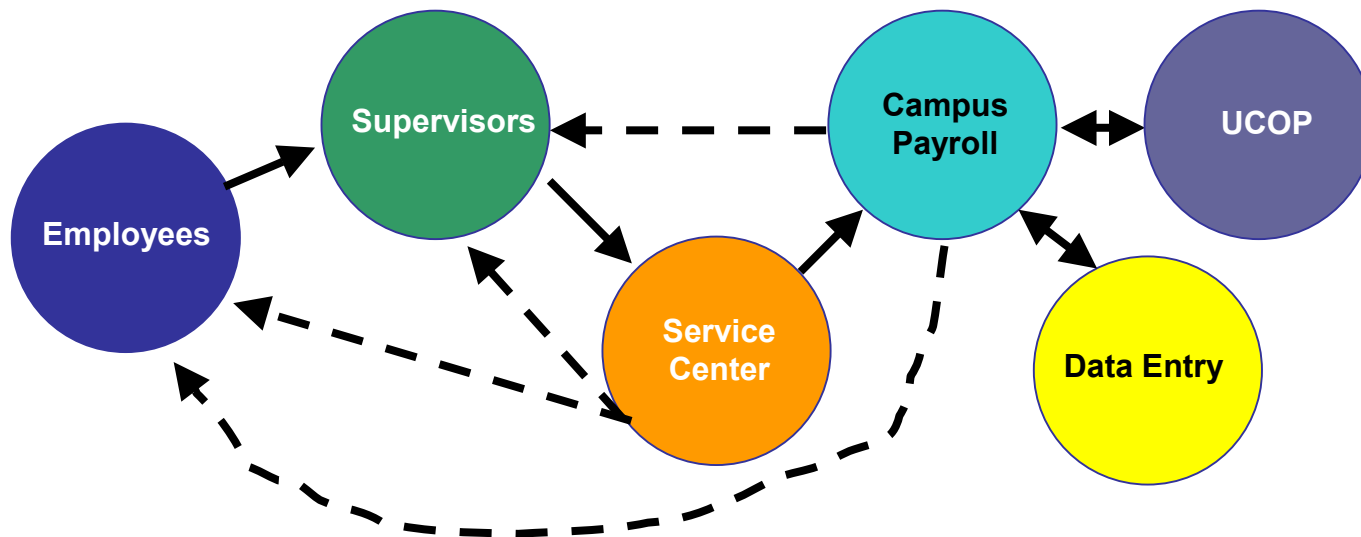
- Engage in estimation of time
- Track information in the service center's time and attendance system
- Adjust time records based on reconciliation of last months time records
- Transmit TRW (time reporting worksheets) to payroll

Issues we are aware of:

- Records are due a significant amount of time before the close of the month
- The need to reconcile time estimated against actual makes the process cumbersome
- Entry and re-entry of the same data
- Payroll errors are higher due to manual timesheet reconciliation

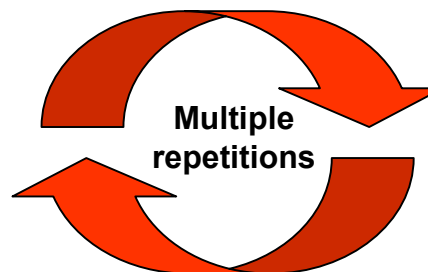


The Current Process



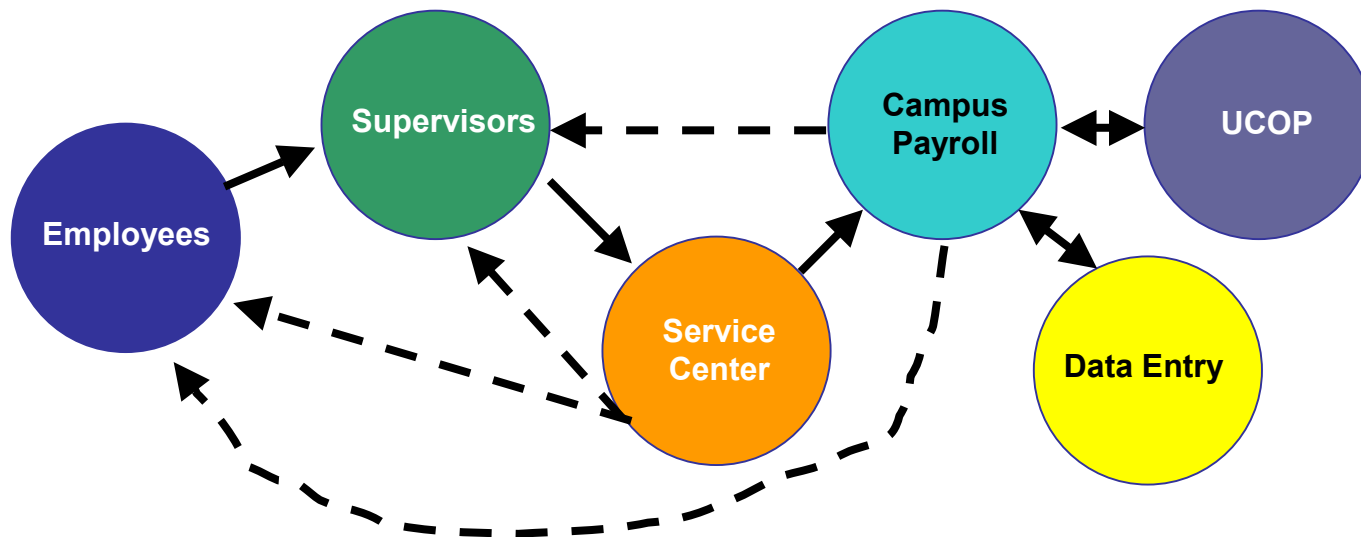
Activities:

- Data entry of all information from the time reporting worksheets
- Auditing of all records
- Apply appropriate deductions
- Creating a file to be sent to UCOP for PPS processing
- Editing of the processed file from UCOP (pre-printing of checks)





The Current Process



Activities:

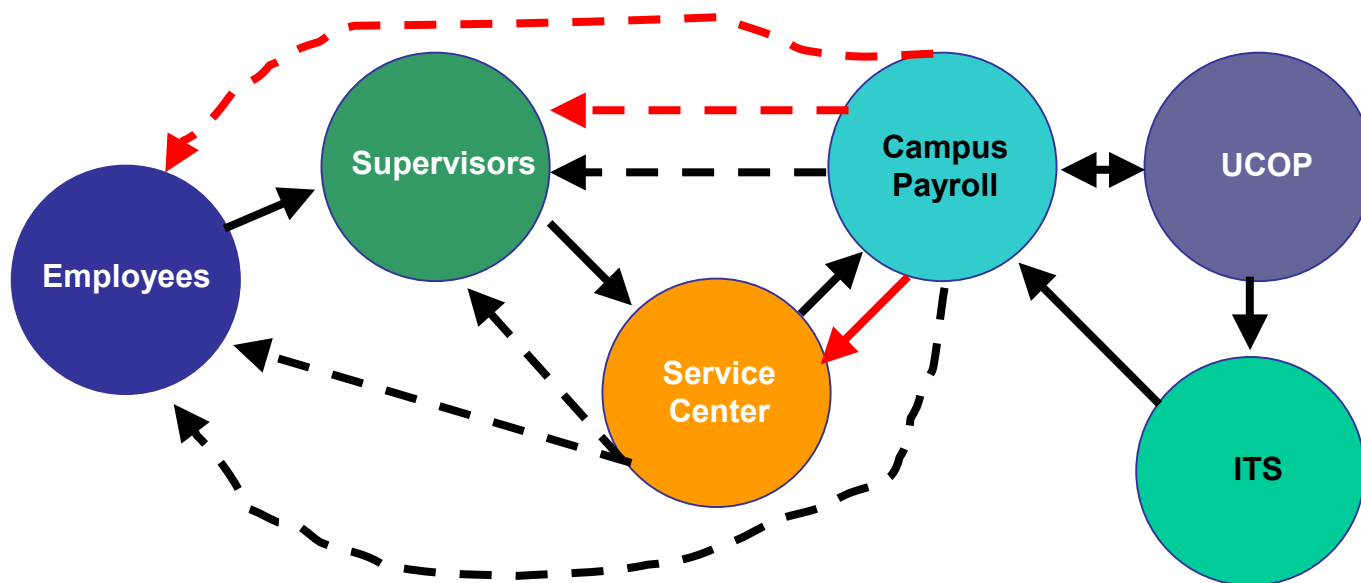
- Data entry of all information from the time reporting worksheets
- Auditing of all records
- Apply appropriate deductions
- Creating a file to be sent to UCOP for PPS processing
- Editing of the processed file from UCOP (pre-printing of checks)

Issues we are aware of:

- A significant amount of data entry
- At least three “cycles” with UCOP as data is processed in the service centers and sent to payroll



The Current Process

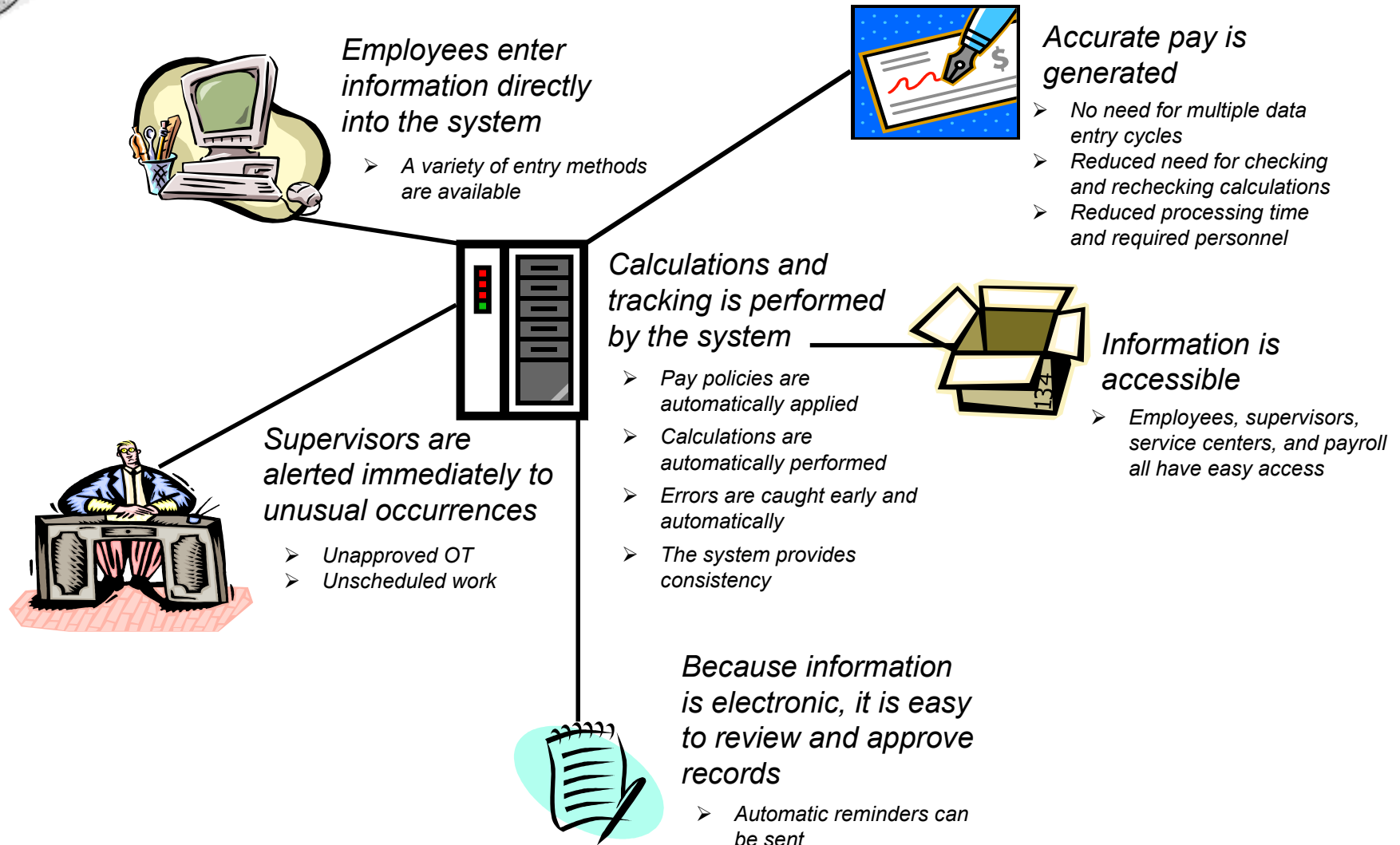


Activities:

- Prints checks
- Sends checks through campus mail to Payroll for audit and distribution to service centers, supervisors, and employees



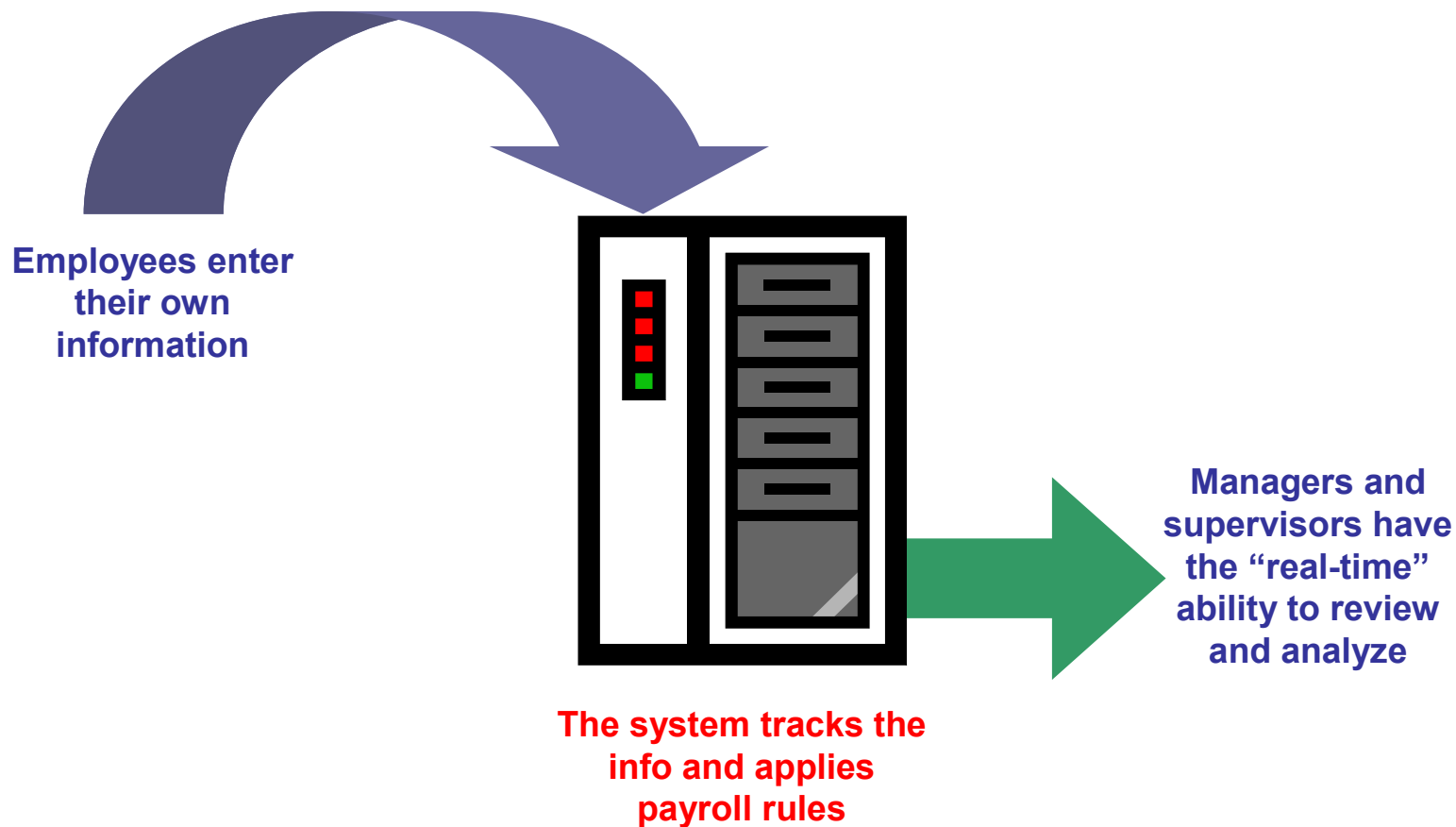
The Redesigned Process





The Redesigned Process

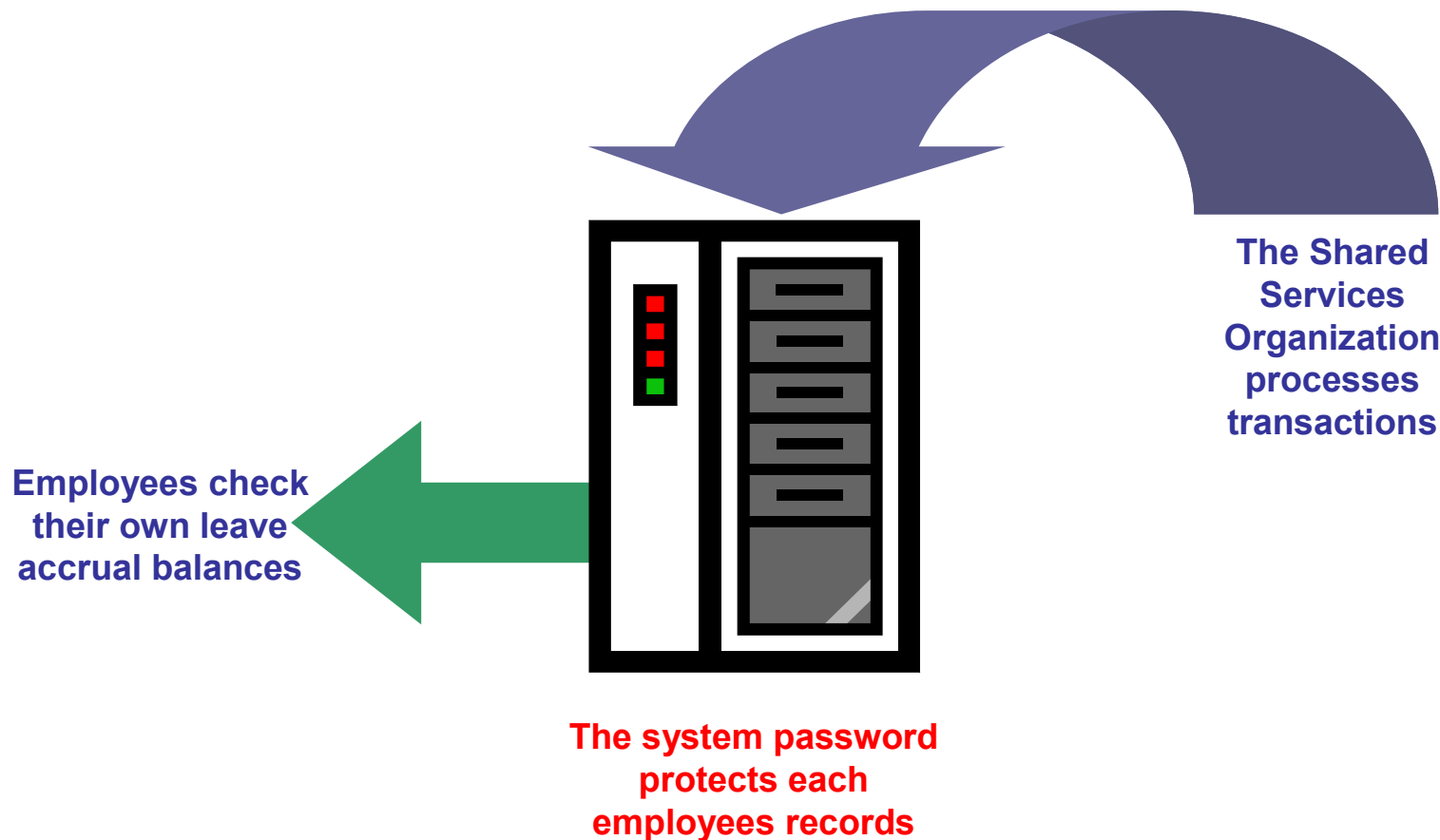
A key component of the new process will be a new ability for various groups to share a single source of information.





The Redesigned Process

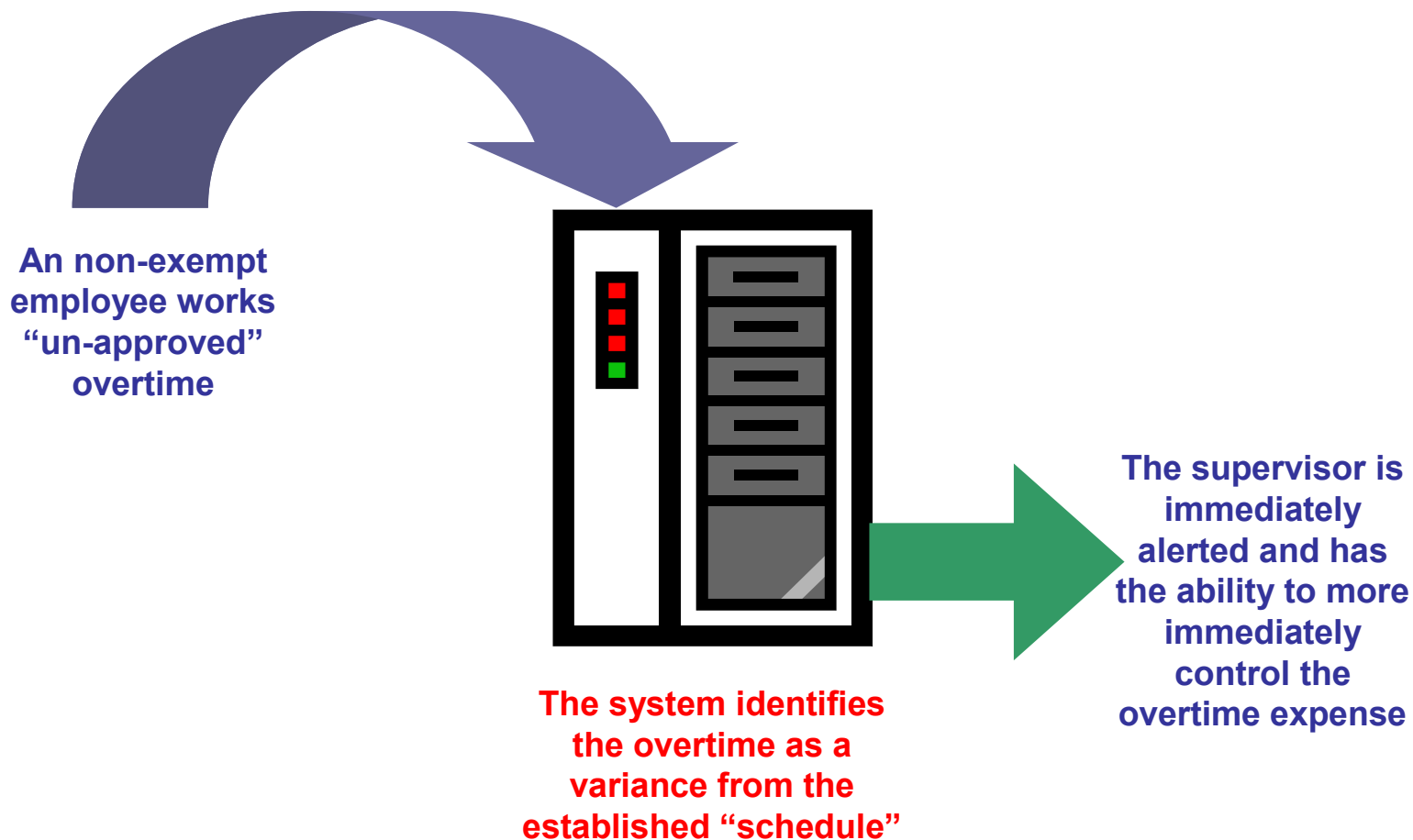
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The Redesigned Process

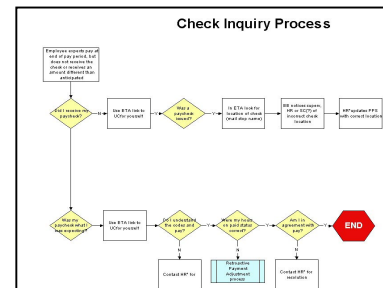
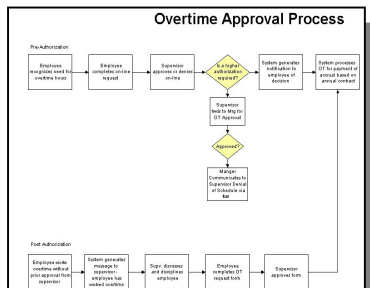
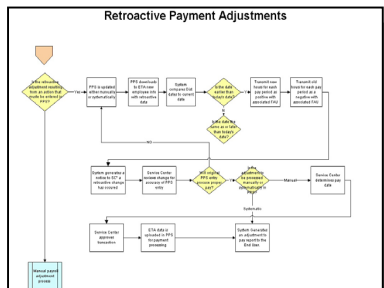
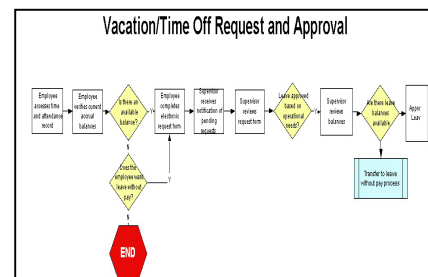
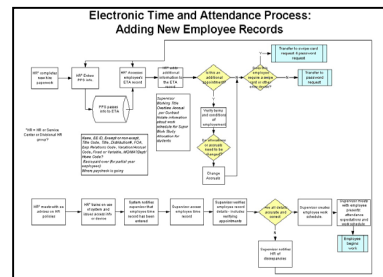
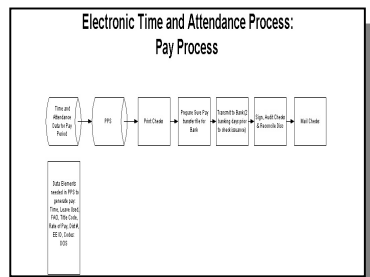
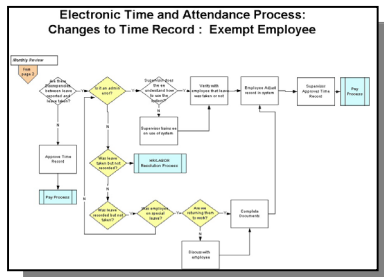
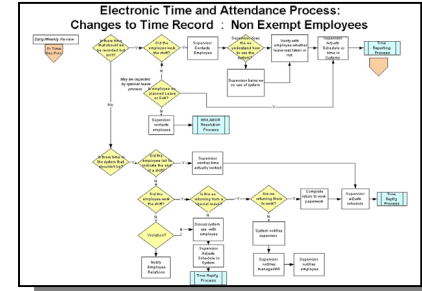
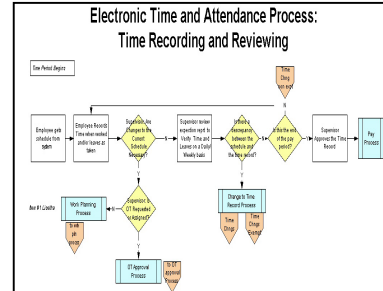
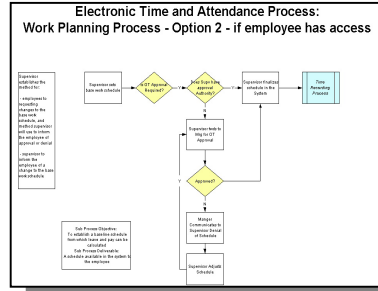
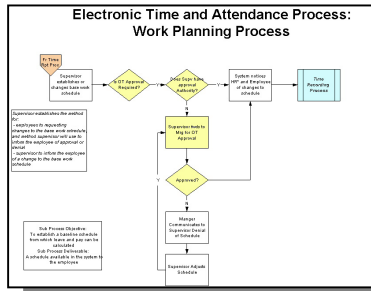
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The Redesigned Process

We've documented the high-level process in 11 process maps.





Expected Benefits

- **Cost savings related to service center headcount reduction**
- **Improved accuracy, management, and tracking of key data**
(1,000 hr rule, benefits eligibility, etc.)
- **Improved control of overtime expenses** *(better stewardship of university resources and tax-payer dollars)*
- **Reduced time to investigate and resolve inquiries and issues**
- **Increased consistency with existing policies (reduction in grievances)**



PROJECTED TIMELINE

	November	December	Jan - Feb	Mar - Apr	May - July	August
Review of the RFP						
Vendor Demos						
Vendor selection and contract negotiation						
Mid-level & detail level process development						
System integration						
User training						
Pilot roll-out begins						

Because we have not made a final selection of a technology partner, it is difficult to accurately forecast the actual time required for systems integration (and associated components), however it should be a goal to develop and implement a pilot phase for the program as soon as possible



Issues and Next Steps

- **The existing practice of “estimating time” may need to be altered**
 - *This is a critical issue that must be resolved if we are going to create improvements in the existing process and lower processing costs*
 - *We will possibly need to change the campus payroll system to a bi-weekly cycle for non-exempt employees*
- **Redistribution of some responsibilities and tighter controls may create cultural issues and *perceived* work-life balance issues**
- **Following vendor selection we will need to engage in the development of a detailed project implementation plan**