

UCPath Center Service Targets

Overview for UC Location Partners

The UCPath Center recently updated their service level agreements and topics and categories. This document provides additional details.

Why Service Targets?

Before the UCPath Center was active and locations were deployed a “3 business day Service Level Agreement (SLA)” was established for Case and Transaction turnaround (time-to-resolution).

- The “3 business day SLA” goal was made in the absence of experiential data. We now have extensive data that we can analyze to re-think the service targets.
 - The “3 day SLA” is too long for some cases/transactions and much too short for other cases or transactions
 - The “3 day SLA” is unrealistic for complex cases/transactions and sets a false expectation of how long it takes to resolve complex cases or transactions

Reasons why cases or transactions may take longer to resolve:

1. Complexity - As a case or transaction moves from “How to” to “event driven,” they typically become more complex and difficult to resolve quickly
2. Touch Points - How many people/departments (both within the UCPath Center and between UCPath Center and the location partners) are needed to resolve a case or a transaction
 - Once the UCPath Center engages a location partner to assist in the resolution, there is less control and more collaboration needed to resolve the issue

How were the new UCPath Service Targets developed?

UCPath Center led a **data based analysis** project to define new targets and ranges in each case and transaction category to resolve an issue

1. Based on the amount of cross-team interaction necessary between the UCPath Center and a location to resolve a case or transaction.
2. The approach and data was reviewed with a focus group in July 2019 comprising various UC partners at each live UCPath location
3. Creation of SIX case and transaction categories (along with examples) was created to clearly explain the expected length of time to resolve a case or transaction
4. Result: Established Six Categories: **How To, Emergency Situations, Common, Unique, Complex, Event Driven**

Result: UCPath replaced the “3 day SLA” with category based Service Targets, which are more realistic for the ~15% of cases/transactions not resolved in one day (effective 1/6/2020)

Category based Service Targets are a reflection of what is currently being delivered by the UCPath Center in each category

- This is meant to answer the question “what should a location or employee expect” for each type of case and transaction
- The targets will be adjusted over time to drive continuous improvement
- For example, once the 80th percentile is exceeded, a higher goal will be set to continuously drive improved service

What changes will the employee see when submitting a case via UCPath online?

- Streamlined Topics: to better classify cases
- Categories: more specific and based on the selected topic
- New Service Target “Date-to- Close” field

How does the UCPath Service Targets help UC locations?

- The new Service Targets gives local SMEs, initiators and approvers the ability to answer questions (based on data) such as **“How long should a transactors/approver/employee expect _____ to be resolved in UCPath?”**

What does the “80th percentile” represent in case and transaction completion?

- The 80th percentile shows that 80% of the transactions/cases will be completed in the timeframe featured in the new Service Targets
- For example, for the common or repeatable cases/transactions the expectation is that we will complete 80% within 1-3 days. Therefore 20% will be completed in 4-5 days

Is UCPath achieving these targets consistently today?

- No. The 80th percentile goals are slightly higher than current performance to drive continuous improvement in the UCPath Center. When we achieve these targets, we will set new targets

What is the impact of new service target?

- Updates the expected resolution time for UC location partners (such as initiators and approvers) and UCPath Center staff, so all have a better idea of how long it may take to resolve a case and/or a transaction in UCPath based on actual data.

Definitions Case and Transaction Processing Categories

Category	Definition of Category	<i>Expected</i> Timeframe to Address and Process (<u>time to resolution in calendar days</u>)	Level of Location Interaction
How to questions (One & Done)	Requests for assistance on how to complete updates or transactions. Typically these requests can be completed with little to no processing, and can be resolved within the initial contact with UCPC. Includes referrals to location contacts for “How To” guidance, out of scope assistance, and general UCPath online navigation questions.	Immediate or almost immediate, typically within same business day	None
Common or Repeatable	Routine, non-complex inquires that may require manual intervention with minimal research, but can be resolved quickly after a manual or systematic update.	1 to 5 days 80th percentile = 3 days	Minimal Involvement
Unique (not repeatable)	Specific scenarios that could require input or transactions across multiple UCPC workstreams to resolve.	5 to 12 days 80th percentile = 8 days	Moderate Involvement
Complex or Multifaceted	Inquires that require coordination across multiple UCPC workstreams, location contacts, and/or third parties in order to be resolved.	12 to 30 days 80th percentile = 20 days	Active Partnering
Event Driven	Items that requires mass employment/record updates or corrections. May have a dependency for system processing or regulatory compliance.	30 days or greater depending on situation	Active Partnering
Emergency Situations	Situations that are causing severe employee hardship.	Immediate	Moderate Involvement

SAMPLE CASE CATEGORIES

<p>How To or One & Done</p> <p>(1 day or less)</p>	<p>Common or Repeatable</p> <p>(1 to 5 days) <i>80th percentile = 3 days</i></p>	<p>Unique Not Repeatable</p> <p>(5 to 12 days) <i>80th percentile = 8 days</i></p>
<p>Examples*</p> <ul style="list-style-type: none"> • Direct Deposit • Address Change • Verification of Employment • Review Paycheck • Change Tax Withholdings • Life Events • Access or Security • Vacation Max /Accrual balance inquires • Pre-conversion updates • Add beneficiaries • Union Specific Inquires 	<p>Examples*</p> <ul style="list-style-type: none"> • Underpayments • Expedited Benefits Coverage • Check Stop/Reissue • Garnishment • Pay Card Request (Regular) • Overpayment adjustment processing & letter generation 	<p>Examples*</p> <ul style="list-style-type: none"> • Accrual Corrections/adjustments • Student FICA changes/refunds • Settlement Agreements • Collective Bargaining Agreement final pay • Non-Resident Alien tax or pay corrections • W2 Corrections • Mid year benefit enrollment changes

* Not an exhaustive list, does not include all case types

<p>Complex or Multifaceted</p> <p>(12 to 30 days) <i>80th percentile = 20 days</i></p>	<p>Event or System Configuration Changes</p> <p>(Potentially 30+ days)</p>	<p>Emergency Employee Situations</p> <p>Immediate</p>
<p>Examples*</p> <ul style="list-style-type: none"> • Overpayment Collection • Interlocation Transfers • Death Cases (Beneficiary Care Coordinator) • Prior year adjustments • Reciprocity • Service Credit Adjustments • Merged Records (same employee) 	<p>Examples*</p> <ul style="list-style-type: none"> • Mass Pay updates • Minimum Wage updates • Academic Range Adjustments • Across the Board adjustments • Salary CAP adjustments • Tax Residency updates for NRA • Shift Differential updates 	<p>Examples*</p> <ul style="list-style-type: none"> • Benefits incorrectly suspended • Missed payroll causing hardship

* Not an exhaustive list, does not include all case types