UCSF Human Resources
Serving the Academic and Staff Community

SERVICE CENTERS B-E
GO LIVE ORIENTATION

January/February 2012
Agenda

- Background
- Going Forward: Go Live Process
- Service Level Agreement
- HR Billing
- Process Maps/Department Transition Tools
- HR Service Request System
- Magical PAF Machine
3 Background
Why are we doing this?

- UCSF faces severe and on-going budgetary challenges
  - We can’t sustain the way we currently deliver academic personnel and staff human resources services
- HR has an increasingly important role as a strategic resource to support the mission and future development of the university
- We need to organize the academic personnel and staff human resources functions to ensure consistent customer service, continuous improvement and economies of scale
  - This requires that we build an integrated service delivery mechanism to serve staff, academic employees and postdocs
What do we expect to achieve?

- Consolidation and integration of AP/HR workforce and service delivery leading to a campus-wide transition
- Clear and consistent standards and partnerships between departments, service centers and specialty centers so that everyone will have a clear understanding of their roles and responsibilities
- Consistent application of policy and improved processes
- Properly trained HR professionals with a career path
- Collegiality among HR professionals
- Systems and tools to improve efficiency (MPM, Advance, HR Service Request System, and case management tool(s))
- Reduced cost
Significant Events in January

- Renamed the organization
  UCSF Human Resources
  Serving the Academic and Staff Community
  - Academic Affairs
  - Human Resources Service Centers A-E
  - Human Resources Specialty Center

- Conducted all day, all UCSF Human Resources Workforce Retreat
  - Shared vision: Partner with the UCSF community to attract, develop and retain the diverse talent necessary to be the world’s preeminent health sciences innovator.
  - Focused on team building and customer service

- Service Center A and Academic Affairs specialty center opened for business in January 2012
  - Trained Service Center A workforce and Academic Affairs specialists in staff and academic processes and procedures, including how to utilize technology – first comprehensive training of this workforce
  - Launched UCSF Service Request System to enable initiation and tracking of service requests
  - Transferred over 4500 personnel files from Service Center A departments to Laurel Heights
Significant Events in January

- We learned a lot from Service Center A Go Live
- Debriefing key groups to refine plans for B-E
  - IT and physical move
  - Service Center A directors and managers
  - Department MSOs and leadership
- We are adapting our timelines, templates, materials and approach based on feedback
Going Forward: Go Live Process
Goals: February through May

- Provide departments with support to ensure a smooth transition
  - Orientation meetings
  - Technology demonstrations
  - Transition planning with individual departments
- Train staff and academic workforce on staff and academic processes and procedures, new technologies
- Relocate workforce to new space
- Transition departments to their service centers (including personnel files) in two waves:
  - B & E: April
  - C & D: May
## Key dates for remaining service centers

<table>
<thead>
<tr>
<th>Date</th>
<th>Milestone</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 5 - 28</td>
<td>Staff in HR Service Centers B and E participate in HR and AP training program</td>
</tr>
<tr>
<td>March 12</td>
<td>Staff in HR Service Centers B and E transfer to HR payroll</td>
</tr>
<tr>
<td>April 6</td>
<td>Staff in HR Service Centers B and E move to Laurel Heights</td>
</tr>
<tr>
<td>April 11</td>
<td>HR Service Centers B and E go live</td>
</tr>
<tr>
<td>April 2 - 25</td>
<td>Staff in HR Service Centers C and D participate in HR and AP training program</td>
</tr>
<tr>
<td>April 10</td>
<td>Staff in HR Service Centers C and D transfer to HR payroll</td>
</tr>
<tr>
<td>May 4</td>
<td>Staff in HR Service Centers C and D move to Mission Center Building</td>
</tr>
<tr>
<td>May 9</td>
<td>HR Service Centers C and D go live</td>
</tr>
<tr>
<td></td>
<td>HR Specialty Center and Deans’ Offices go live are rolling as service centers go live</td>
</tr>
</tbody>
</table>
Go live approach

- Two sets of activities
  - General: focused on disseminating consistent information to all client departments
  - Department-specific: focused on gathering information from departments to learn your business and prepare transition

- General department engagement
  - Series of three meetings for all department managers to attend
  - Content will provide the foundation for transition planning and individual department interactions
    - Orientation – overview of key topics and transition plans
    - Technology demonstrations
      - HR Service Request System
      - Magical PAF Machine (MPM)
    - Focus of the demonstrations will be system functionality, roles, and needed departmental planning

- Department-specific engagement
  - Your Service Center director and managers will meet with you 2-3 times
    - Service centers with a large number of departments may meet with departments as sub-groups
  - Content will focus on department’s HR needs and transition plans
Roles and responsibilities for transition

- **Departments**
  - Provide/review information about department business and employee population
  - Complete checklists of needed materials
  - Create/complete handoff log
  - Assess and plan any changes to internal workflow and approval structures

- **Service Center directors and managers**
  - Learn clients’ business needs and concerns
  - Manage client-specific transition activities (transition meetings with departments, information gathering and work handoff)
  - Manage service center readiness activities (training needs, building teams, etc.)
  - Schedule and coordinate meetings with departments

- **HR Business Services**
  - Coordinate all move activities and employee onboarding (with support of Service Center C)
  - Manage file transfer and intake
  - Oversee systems/access transition
Staff transition

- Staff moving into the new organization will transfer to HR payroll one month before go live
  - Staff will continue to support departmental HR needs, but workload may need to be scaled back to accommodate transition period

- Training will be 10 half-days during the month prior to go live
  - Staff, academic and transactional training will be at different times
  - Some individuals may attend staff and academic training, thereby being out of the department more than 10 half days

- Physical moves will be few days before go live
Service Level Agreements
Service Level Agreement overview

- The Service Level Agreement (SLA) is our commitment to our customers.
- The SLA is based on detailed design and process mapping outcomes that resulted from discussions between stakeholders and service providers.
  - Process maps are reviewed in the training and are available on the OE website.
- The SLA includes metrics that we will measure and report.
- The SLA will help us focus on our commitment to continuous improvement.
- The SLA will evolve as our organizational and customer needs change.
  - Advisory Board will review once it is constituted in February.
Service Level Agreements overview (continued)

- One service level agreement for all departments
- HR Service Center directors and managers will discuss the SLA in more detail in meetings with department
- There are agreements outside the SLA between business partners and clients
- Metrics are flexible based on our learning experience
Departmental transitions

- UCSF HR is committed to making the transition as smooth as possible.
- If there are processes that require time to change, the Service Center directors and managers are committed to address them as required.
- Customer satisfaction surveys will be used.
SLA issue resolution

- Business Partners will be proactive about letting departmental customers know if average turnaround times cannot be met and why
- Managers/directors will address customer concerns or escalates as appropriate
  - We rely on customer feedback
We strive for the highest level of customer satisfaction. To ensure we deliver consistent, quality, and timely service, UCSF Human Resources commits to the following standards:

- Dedicated Human Resources Business Partners will be available M-F 8:00am to 5:00pm (UC holidays excluded)
- Customer requests for service via phone, email or the Human Resources Service Request System will receive a response within two business days
- Responses to requests will acknowledge the request and specify any additional information and/or documentation required to proceed with delivery of the service
- Once all information is received from the requesting department, the request will be processed as soon as possible

Once we have established baseline information on routine processing times and standards we will develop a customer satisfaction survey score which we will measure and report
# Staff metrics

<table>
<thead>
<tr>
<th>Activity</th>
<th>Average Turnaround</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Job Postings (replacement positions with no significant changes)</td>
<td>3 business days</td>
</tr>
<tr>
<td>Web Job Postings (new positions and replacement positions with significant changes)</td>
<td>5 business days</td>
</tr>
<tr>
<td>Funding changes*</td>
<td>3 business days</td>
</tr>
<tr>
<td>Employee Information Changes*</td>
<td>3 business days</td>
</tr>
<tr>
<td>Complete Review of Business Plan for Lay Off*</td>
<td>10 business days</td>
</tr>
<tr>
<td>Separations-request to OLPPS updated and final check processed*</td>
<td>3 business days</td>
</tr>
<tr>
<td>Complete review of reclassification, stipend and equity</td>
<td>10 business days</td>
</tr>
</tbody>
</table>

*Also applies to Post Docs
# Academic metrics

<table>
<thead>
<tr>
<th>Activity</th>
<th>Average Turnaround</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Recruitment Plan received in Dean’s Office to Department</td>
<td>20 business days</td>
</tr>
<tr>
<td>receiving an approved Search Number in ADS</td>
<td></td>
</tr>
<tr>
<td>Search Process Report received in Dean’s Office to Department</td>
<td>20 business days</td>
</tr>
<tr>
<td>notification of approval status</td>
<td></td>
</tr>
<tr>
<td>Approved appointment and advancement actions keyed in (MPM or OLPPS)</td>
<td>5 business days or effective date of action</td>
</tr>
<tr>
<td>*Also applies to Post Docs</td>
<td></td>
</tr>
<tr>
<td>Academic Sabbatical/Professional Development Leave Request</td>
<td>20 business days</td>
</tr>
<tr>
<td>as certified by the Chair to Department receiving approval by VPAA</td>
<td></td>
</tr>
<tr>
<td>Journal Ads: from VPAA sending ARP approval to Service Center to ad is</td>
<td>3 business days</td>
</tr>
<tr>
<td>sent to journals</td>
<td></td>
</tr>
</tbody>
</table>

*Also applies to Post Docs
Measurements

- **Metrics**
  - HR Service Request System
  - Other reports in development
- Quick customer satisfaction surveys on all email signatures
- Periodic regular customer satisfaction surveys
UCSF HR Billing
UCSF HR budget overview

- Transformed organizational structure under one AVC comprised of five service centers, an academic specialty center and a staff specialty center
- A reduction in 76 FTE from the 2010 survey baseline of 249 to 173
- Creates annual savings of over $7 Million by FY17-18
## Allocation of UCSF HR costs FY12-13

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Estimated UCSF HR Service Delivery*</td>
<td>$22,294,001</td>
</tr>
<tr>
<td>• Five UCSF HR Service Centers</td>
<td></td>
</tr>
<tr>
<td>• Staff and Academic Specialty Centers</td>
<td></td>
</tr>
<tr>
<td>• Deans’ Offices Academic Affairs Managers</td>
<td></td>
</tr>
<tr>
<td>• Amortized startup costs (3 years)</td>
<td></td>
</tr>
<tr>
<td>Subtract contribution from Central HR, Academic Personnel and Dean’s Offices Academic Affairs</td>
<td>$ 7,377,054</td>
</tr>
<tr>
<td>Total Costs Allocated to Schools/Departments</td>
<td>$ 14,916,947</td>
</tr>
</tbody>
</table>

* Does not include centrally funded technology costs
Headcount weights

- Headcount weights were validated by five UCSF departments in Fall 2010 and refined by input from Schools.

- Weights will be reevaluated every year.
  - Paid Faculty = 1
  - Faculty Without Salary
    - Volunteer Clinical Faculty = 0.2
    - Emeritus Faculty without recalls = 0.2
    - All other Without Salary Faculty = 1
  - Post-docs and Non-Faculty Academics = 0.8
  - Staff = 0.8
FY 12-13 Headcount Price per Year

- Paid Faculty: $1,119
- Faculty Without Salary
  - Volunteer Clinical Faculty: $229
  - Emeritus Faculty without recalls: $229
  - All Other Faculty without Salary: $1,119
- Post-docs and Non-Faculty Academics: $896
- Staff: $896
UCSF HR billing principles

- UCSF HR Advisory Board will review billing methodology and budget annually
- Budgets will be developed by the end of February annually
- Bills will be based on the headcount of each department identified by the Home Depcode of the employee *
- Headcount snapshot will be taken on March 1st annually (see next slide)
- Headcounts will be weighted based on effort
  *Exception: Organized Research Units – the alternate depcode may override home depcode to accommodate the Academic requirements
UCSF HR headcount snapshot

- **Headcount snapshot will be taken on March 1st annually**
- **Startup year**
  - Headcount snapshot will be taken on February 15, 2012 to give budget planning guidance for FY 12-13
  - Departments will have 60 days to clean up employee title codes to ensure accurate headcount
  - Final headcount snapshot will be taken on May 1st, 2012
  - The official rates and billing charges for FY 12-13 will be published on May 31, 2012
Billing method

- One amount will be calculated for each department based on headcounts
- Department is defined as no lower than Level 4 depcodes or 2 levels below control point
- Departments will submit a list of Fund DPAs and percentages to be billed by July 1, 2012*
- Departments may change the Fund DPA list and percentages during the fiscal year

*The HR Service Request System will provide departments with their headcount and allow them to indicate fund DPAs and percentage distributions
Budget Office guidance

- The UCSF HR billing is a reapportionment, not a recharge
- Reapportionment NCAs (2 credit and 2 debit) will be determined soon and used starting 12-13
- The UCSF HR billing charges are:
  - Not appropriate for Federal Contracts
  - Appropriate for State Contracts but may encounter rejection
  - Determined on a case by case for all other contracts and grants
Billing is only from go-live month to fiscal year end
- Service Center A – February to June
- Service Center B – April to June
- Service Center C – May to June
- Service Center D – May to June
- Service Center E – April to June

Billing costs consist of only direct costs of each Service Center (no technology costs and amortization)
FY11-12 headcount snapshot

- Headcount snapshot is taken on the month of go-live
  - Service Center A – February 1st
  - Service Center B – April 1st
  - Service Center C – May 1st
  - Service Center D – May 1st
  - Service Center E – April 1st

- Weighting of headcount is the same
  100/80/20/20
FY11-12 billing details

- Departments will receive headcount details and the allocation dollar amount on February 15.
- Departments will receive refreshed headcount details and allocation dollar amount on April 11, 2012 for Service Centers B/E and May 9, 2012 for Service Centers C/D.
- Departments must provide a list of Fund DPAs and percentages to be billed by go-live date or a default Fund DPA will be chosen.
- The Fund-DPA list will be used for the rest of the FY11-12.
- Billing NCA (per Budget Office guidance for FY11-12 only):
  - 435060 – Rechg – Shared Admin Svcs
  - 495060 – Rechg Cred – Shared Admin Svcs
## Headcount and billing summary

<table>
<thead>
<tr>
<th>Date</th>
<th>FY11-12</th>
<th>FY12-13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 15th 2012</td>
<td>UCSF HR will send headcount and 11-12 billing charges to all departments based on Feb 1st snapshot.</td>
<td>UCSF HR will send headcount information and 12-13 billing charges to all departments based on Feb 1st snapshot.</td>
</tr>
<tr>
<td>April 11th 2012</td>
<td>UCSF HR send Service Center B &amp; E departments snapshot and billing charges based on headcount for April 1st. Departments must submit Fund-DPA list before this date.</td>
<td></td>
</tr>
<tr>
<td>May 9th 2012</td>
<td>UCSF HR send Service Center C &amp; D departments headcount and billing charges based on May 1st. Departments must submit Fund-DPA list before this date.</td>
<td></td>
</tr>
<tr>
<td>May 9th 2012</td>
<td>FY 12-13 headcount snapshot is taken</td>
<td>FY 12-13 FINAL headcount and billing charges are published.</td>
</tr>
<tr>
<td>May 31st 2012</td>
<td></td>
<td>All departments must submit Fund-DPA list before this date before this date.</td>
</tr>
</tbody>
</table>
FY11-12 staff startup cost

- Directors and managers are allocated 20% to UCSF HR
- Staff are allocated 100% to UCSF HR one month prior to go-live
Departmental Transition Tools
In August 2011, two groups of department managers from all four schools formed OE AP/HR Departmental Transition Teams (DTT) to analyze the process maps for conducting academic personnel and human resources work in the new shared services organization.

The charge was to assess the process maps, identify critical issues for department managers to consider and develop tools to support departments in transitioning to the new AP/HR model.

- Identified questions, concerns and needed clarifications
- Issues were resolved through dialogue with the Leadership Team

A toolkit was developed to help department managers review the process maps and begin planning for their department’s transition to shared services.

Key result was that department managers in Service Center A felt that they needed to review each process map themselves to really understand the way work will be conducted.
Membership

- **Team A (focus on academics/post-docs)**
  - Judi Mozesson, Family and Community Medicine
  - Jessica Welsh, Institute for Neurodegenerative Diseases
  - Jane Czech, Neurology
  - Jackie Jew, Pediatrics (co-chair)
  - Marie Caffey, Psychiatry/LPPI
  - Susan Sall, Service Center A Director (co-chair)
  - Richard Secunda, Dean's Office, SOM
  - Eileen O'Sullivan, Radiology
  - Shelley Kennedy, Psychiatry

- **Team B (focus on staff)**
  - Vickie Lewis, Rad Onc (co-chair)
  - Daniel Dominguez Moncada (co-chair)
  - Richard Secunda, Dean’s Office, SOM
  - Cathy Garzio, Radiology
  - Alesia Woods, Physiology
  - Carol Massey, Emergency Medicine/SFGH
  - Marina Dronsky, SOD
  - Larisa Kure, Microbiology
  - Karen Mah-Hing, SON
  - Dixie Horning, Department of Anthropology, Sociology and History of Medicine; and OB/GYN and Reproductive Sciences
  - Bob Colmenares, FAS-HR
DTT toolkit

- **Materials available on the OE website at**
  [http://operationalexcellence.ucsf.edu/resources/aphr-department-transition-tools](http://operationalexcellence.ucsf.edu/resources/aphr-department-transition-tools)

- **Department Action Grid**
  - A summary view of departmental roles, including impact on funding and required action by supervisors, MSOs/Division Administrators, and Chairs/Division Chiefs

- **Process Inventory and Summary of Roles**
  - A high-level overview of roles between departments and service centers

- **Map Cover Sheets and Process Maps**
  - Narrative overview of the interaction between departments, shared service centers, specialty centers and other key stakeholders; indications of key changes and considerations for departments to evaluate
  - Maps that detail the proposed roles and responsibilities and workflow handoffs among departments, service centers, specialty centers and other offices

- **Pending Issues List**
  - Issues pending resolution at the close of the DTT analysis

- **Issue Log**
  - Detailed notes about all the issues raised and addressed through the DTT analysis
HR Service Request System
Overview

- Previously departments worked with their internal HR folks to initiate, review and approve HR service requests.
- In the new world they will be working with an HR professional outside their departments.
- There are business process and workflow implications that departments need to consider to ensure proper controls and communication of accurate information.
- The **HR Service Request System** is an enabling technology that allows departments to request, review, control and monitor progress on all HR service requests.
HR Service Request System Overview

- The system provides ability for departments to make on-line transaction requests to the service center
  - Enables departments to submit requests for entire HR life cycle (recruit, hire, make changes to records, separate, etc.) for staff and academic personnel.
  - Captures required data elements so that requests are complete and HR service center can process them quickly and accurately
  - SRS does not replace face to face or phone conversations!
- The system **auto-populates** with key PPS data to limit department typing and improve data accuracy (Examples include employee name, EID, work location, funding information, department information, etc)
- The system has a user role and security structure that is flexible yet based on proper controls
  - Includes a flexible framework for Department “Initiators” and “Approvers” based upon departmental business process
  - Security and access to data is driven by department code
- The system provides work lists to helps departments and the service centers manage and track requests
Experience with HR Service Request System to-date

- Deployed system 1/17/12 with Service Center A departments

- As of 2/3/12:
  - All 7 departments supported by Service Center A are using it
  - Service Center A received 352 requests through the tool

- Feedback from departments:
  - Tool is intuitive
  - Major “to do” for departments is to think through their business processes prior to go-live to identify who they want to initiate and approve transactions
  - Ability to see all of department’s requests/transactions and their status is very valuable to department managers
Magical PAF Machine
Why was the MPM developed?

- Faculty payroll involved laborious, redundant steps with a high potential for error
  - Complex calculations for comp plan faculty
  - Analysis required to translate funding and compensation into OLPPS appointment and distribution lines
  - Manual rule-checking to ensure compliance with financial and academic affairs rules, and to catch arithmetic errors
  - Lengthy processing time which delayed transactions, sometimes resulting in additional transactions to make retroactive corrections
    - Quadruplicate carbon copied forms, manual routing for signature through Deans’ Offices and VPAA for review and approval, then to Payroll to be keyed into OLPPS.
  - Unnecessary printing and filing of paper PAFs
- The MPM automates comp plan faculty payroll actions using one system and one point of data entry
- Quick Win was the companion project that distributed OLPPS keying from Campus Payroll to participating departments
Current functionality

- One system/data-entered once
- Automatic rule-checking within the system
- Dean’s Office review/approval will be done through reports that highlight exceptions for review/approval
- Once approved, PAF data is entered into OLPPS, and then automatically checked by the system to ensure that the updates to OLPPS are accurate and error-free

- Actions are approved through variety of online and off-line processes
- MPM replaces faculty salary calculator (FSC) spreadsheet and carbon copy PAF for most faculty
- Preparer “submits” changes via MPM
- Transactions are reviewed and signed by MSO/Chair/delegate
- Transactions are reviewed and approved by Deans’ Offices and/or VPAA, depending on type of action
- Keyer generates keying instructions payroll actions submitted via MPM
- Keyer updates status to “keyed into OLPPS” via MPM
- Keyer generates reconciliation report to identify and correct keying errors
- Dept reviews PANs and compliance reports
- Control points review compliance report to monitor exceptions to policy
Functionality for March 2012

- Next phase: MPM will upload payroll changes directly into OLPPS
  - Expected March 2012

  - Actions are approved through variety of online and off-line processes
  - MPM replaces faculty salary calculator (FSC) spreadsheet and carbon copy PAF for most faculty
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  - Transactions are reviewed and approved by Deans' Offices and/or VPAA, depending on type of action
  - MPM will automatically upload changes to OLPPS
  - Keyer generates reconciliation report to identify and correct keying errors
  - Dept reviews PANs and compliance reports
  - Control points review compliance report to monitor exceptions to policy
Next Steps
Start your engines…

- Your next steps to prepare for go live:
  - Attend technology demonstrations
    - HR Service Request System
    - MPM (if applicable)
  - Participate in department-specific meetings to prepare for your department’s work transition
  - Assess current internal business process vis-à-vis changes in approvals and handoffs to service centers and start departmental change management
  - Prepare personnel files for handoff (instructions to be provided)
  - Process anticipated/upcoming personnel actions now – don’t wait to the last minute
  - Proactively work through your academic renewals process and keep thorough documentation for handoff
  - Keep us informed of concerns or questions
Thank you

- Slide deck will be posted on the OE website
- We welcome questions – now and throughout the go live process!
The approach: Improved systems and streamlined workflow (detail)

- Actions are approved through variety of online and off-line processes, e.g.,
  - Merits/promotions/changes in series approved through Advance
  - Use of funding sources approved by email
  - Other actions through approval letters

- MPM replaces faculty salary calculator (FSC) spreadsheet and carbon copy PAF for most faculty
- Preparer obtains approvals off-line
- Preparer makes changes to compensation, funding, appointments
- Preparer “submits” changes via MPM

- Transactions are reviewed and signed by MSO/Chair/delegate
- Transactions are reviewed and approved by Deans’ Offices and/or VPAA, depending on type of action

- Keyer generates keying instructions payroll actions submitted via MPM
- Keyer updates status to “keyed into OLPPS” via MPM

- Keyer generates reconciliation report to identify and correct keying errors
- Dept approver continues to review PANs as always
- Dept approver and control points review compliance report to monitor exceptions to policy; errors and unapproved actions are corrected with help from keyer
With our next MPM release, another step will be eliminated, reducing work for HR service centers (detail)

**MPM will upload payroll changes directly into OLPPS via batch upload or web services (analysis still be completed)**

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- **MPM will automatically upload changes to OLPPS**

- Keyer generates reconciliation report to identify and correct keying errors
- Dept approver continues to review PANs as always
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