

To: UCPath Functional Users, Business Officers and AP Analysts in Academic Units

From: Tamara Berton, AP UCPath Manager

Re: UCPath Reminders and Updates: Academic Transactions, Processes and Resources for Winter

UCPath Deadlines, Processing Freeze Dates and Proactive Action:

November and December tend to be hectic UCPath processing times with holiday closures and year-end activities like fiscal close and open enrollment. It is important to proactively review any upcoming actions needed that impact employee pay and benefits, and initiate transactions in advance to allow for all campus approvals and UCPC processing to avoid erroneous terminations or appointment extensions that lead to pay and benefit issues. Please review the dates and deadlines outlined below, as well as the Best Practices around end dates, Lecturer appointments and ASE 4-month employees to determine department actions and timing to facilitate a smooth transition for employees.

Holidays and Transaction Deadlines:

The AP Office will be closed on the holiday and office closure dates listed below. Please submit all necessary transactions by the [AP Deadlines](#) listed to ensure appointments are set up correctly and pay and benefit impacts are addressed prior to holidays and office closure dates.

Holidays:

- Thursday, November 24th, Thanksgiving
- Friday, November 25th, Day after Thanksgiving
- Friday, December 23rd, Winter Holiday
- Monday, December 26th, Winter Holiday
- Friday, December 30th, New Year Holiday
- Monday, January 2nd, New Year Holiday

AP-Path PayPath Transaction Deadlines

Pay Date	AP OTP Transactions Due by 10am	AP PayPath Appointment & Cert due by 10am	Processing Freeze
Thursday, 12/1/22	Monday, 11/14/22	Thursday, 11/17/22	11/21/22 at 5pm through 11/24/22 at 6am
Tuesday, 1/3/23	Thursday, 12/15/22	Monday, 12/19/22	12/21/22 at 5pm through 12/28/22 at 6am

AP Office Closure:

The AP Path team will be observing the winter holiday soft closure dates between Friday, December 23rd through Monday, January 2nd. **Any December pay impacting actions are due by Monday, 12/19/22 at 10:00 am to ensure processing is finalized in time for the 1/3/23 paycheck.**

Expected Job End Dates

Departments are responsible for monitoring appointments with upcoming end dates and taking appropriate action to extend continuing appointments, terminate ending appointments, or apply Short Work Break (SWB). Proactive action is necessary to avoid unintended impacts such as erroneous termination, missed-/over-payments, loss of benefits, or system access interruptions. Refer to the [End Date Monitoring](#) job aid in the *Resources for Department Analysts>UCPath* section of the AP website for additional guidance.

Academic student employees appointed on a 9/12 basis for fall:

Academic student employees who are appointed on a 9/12 basis for fall that will continue into winter quarter will need to have the *Comp Frequency* changed from **UC912** to **UC_9M** effective January 1, 2023 via a PayPath action. If this change is not processed in time for January payroll processing, the employee will be over-paid. See the [ASE Four Month Pay Job Aid](#) for detailed guidance.

Pre-Six Lecturer Appointments

Under the new contract, Pre-Six Lecturers are appointed for 1-, 2- or 3-year term appointments until they complete their Excellence Review and transition to Continuing status.

- **9/9 appointments** do not typically teach all three quarters, and their UCPATH records are adjusted each quarter according to their appointment workload. As such, *departments must keep track of the status of these appointments over the course of the year*:
 - **Short Work Break** will be applied automatically during non-working quarters where the appointment is to continue. 9/9 Pre-Six titles will have SWB applied during non-working quarters *IF* their appointment includes future working quarters (e.g. a 1-year term appointment set to work in fall and spring; SWB will be applied during winter quarter based on post-audit instructions).
 - **Termination** templates must be submitted by the department at the end of the last working quarter of a Term appointment (e.g. a pre-six 9/9 Lecturer has a 1-year term appointment and is only working in fall; the department must submit a Termination template effective 1/1/23, Last Day Worked 12/31/22 at the end of fall quarter because there is no teaching assignment for winter or spring quarters).
 - The **End Job Automatically** checkbox is not used for Continuing or Pre-Six Term appointments – a Termination Template should be used to capture the most accurate separation reason.
- **9/12 appointments** are expected to teach all three quarters during the academic year, and unless there is an amendment processed for their appointment, the UCPATH records will remain consistent according to their original set up.

Department Action Steps:

- Review current fall quarter (9/9 term) appointments, identify any appointments that should terminate effective 1/1/23 (*term appointment ends in June 2023 and only working in fall*) and submit a Termination template.
- Review upcoming winter quarter (9/9 term and continuing) appointments to ensure UCPATH set up matches what is expected based on the appointment memo; reach out to ap-path@ucsb.edu if any discrepancies are identified.
- To ensure any 9/9 appointments (new term appointments or modifications to existing winter quarter appointments) are set up correctly in time for January pay deadline, paperwork must be received by the AP Policy Analysts by **December 15th, 2022**. Paperwork received after this deadline may not be finalized in time for the January paycheck, and additional action may be necessary if overpayments and missed payments occur. Departments are responsible for initiating over- and missed-pay via BFS ServiceNow.

AB119 – Maintaining Physical Work Location & Personal Information

Under California Assembly Bill 119, the University has a legal obligation to provide accurate and timely information about the physical work location and personal contact information of represented employees to their respective unions. Non-compliance may result in hefty fines. Departments are responsible for:

- Reminding employees to keep their personal contact information up to date in UCPath
 - Employee have the ability to update their personal information using the [UCPath Self Service Portal](#)
 - [Update My Address](#)
 - [Update My Phone Number](#)
 - [Update My Email Address](#)
 - Departments can also assist employees with updating personal information via the [Personal Data Change Template](#).
- Maintaining the **Location** and **Cubicle** information on employee **Job Data** to accurately reflect the employee's physical work location. Instructions for [Maintaining Location and Cubicle information in UCPath](#) for Academics are located on the AP website.

Off-boarding: Personal Email and access to Former Employee Portal...

When an employee is leaving UC and does not have other active appointments, it is important to remind them to update their personal contact information prior to them separating from UC. An updated personal email should be provided and marked as primary to ensure they will be able to set up access to the **Former Employee Portal** to continue to view their historical paycheck information and access their W2 for tax preparation purposes. Instructions for employees to update their email as well as setting up former employee portal access are below:

- [Update My Email Address](#)
- [UCPath Former Employee Portal](#)

Accruals and Multiple Appointments

When an employee has multiple appointments in accruing titles with different accrual rules under policy, it is a best practice for departments to [review actual accruals](#) on each employee record in the UCPath system. If a discrepancy is noted, please work with BFS on corrective action. If there are questions regarding what accruals an employee is entitled to under policy, the [Policy Analyst](#) that supports that population should be consulted.