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 Winter break, year-end financial 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 23rd, Thanksgiving
- Friday, November 24th, Day after Thanksgiving
- Monday, December 25th, Winter Holiday

- Tuesday, December 26th, Winter Holiday
- Monday, January 1st, New Year Holiday
- Tuesday, January 2nd, New Year Holiday

AP-Path PayPath Transaction Deadlines

Pay Date	Template Transactions Due by 10am	PayPath AP Folio UCPath Cert due by 10am	Processing Freeze
Friday, 12/1/23	Tuesday, 11/14/23	Friday, 11/17/23	11/21/23 at 5pm through 11/28/23 at 6am
Tuesday, 1/2/24	Thursday, 12/14/23	Tuesday, 12/19/22	12/21/23 at 5pm through 12/28/23 at 6am

AP Office Closure:

The AP Path team will be observing the winter holiday soft closure dates between Monday, December 25th through Tuesday, January 2nd. Any December pay impacting actions are due by Tuesday, 12/19/23 at 10:00 am to ensure processing is finalized in time for the 1/2/24 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, 2024 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.

Lecturer Appointments

Departments are responsible for:

- reviewing set up of Lecturer appointments in UCPath,
- notifying ap-path@ucsb.edu if any issues are identified, and
- identifying any Term appointments that should be Terminated at the end of a quarter/Term.

Department Action Steps:

Current 9/9 Appointments:
- Winter is an Active Working Quarter:
  - FTE and Pay align with appointment memo
  - Payroll Status is "Active"
- Winter is **NOT** an Active Working Quarter
  - *Continuing* Appointments: Payroll Status is "Short Work Break"
  - *Term* Appointments:
    - If a Term appointment has future working quarters under the existing Term: Payroll Status is "Short Work Break"
    - If fall was the last working quarter of the existing Term appointment: Process a Termination Template (Effective Date 1/1/24; Last Day Worked 12/31/23)
      - *REMINDER: 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.*

New 9/9 Appointments in Winter:
- Process the Hire transaction, effective 1/1/24 once post-audit hiring instructions have been received.
- Validate Job Data (FTE and Pay) is correct once the Hire is fulfilled.

Note: 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, 2023. 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.*

9/12 Appointments:

These appointments are expected to teach all three quarters during the academic year; unless there is an amendment processed for their appointment, the UCPath records will remain consistent according to their original set up.

For additional guidance on how to review appointment set up in UCPath – please review the UCPath Job Data and Workforce Job Summary Job Aid available on the ucpath.ucsb.edu site.

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
    - Employees 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

HR Worksite ID – I-9 Processing

Departments who participate in the I-9 validation process with BFS can now request the **HR Worksite ID** to be updated to their department specific code on *Academic Non-Student Positions* via the **Appointment Approval** process through Academic Personnel. Please see the memo sent to campus on November 7, 2023 for additional detail.

Note: Departments who do not participate in the I-9 validation process will retain the existing HR Worksite ID of 91-BFS. Questions on the I-9 processes should be directed to BFS – ServiceNow.

UCPath Approvers – Approving Transactions Resources

UCPath Approvers play a critical role in ensuring that input in UCPath Transactions is correct before the data writes to **Job Data**, leading to successful pay and benefits actions for employees and help avoid negative impacts.

To better support approvers, two slide decks and recordings are available on AP's website (**Approving Template Transactions** & **Approving PayPath Transactions**). https://ap.ucsb.edu/training.and.workshops/staff.training.materials/ If you are a UCPath transaction approver, please take a few minutes to watch the recordings or review the pdf slides.