

To: UCPATH Functional Users, Business Officers and AP Analysts in Academic Units (via SBADM-L)
 From: Tamara Berton, AP UCPATH Manager
 Re: Reminders and Updates Regarding UCPATH Academic Employee Transaction Processing

AP UCPATH Resources for Department Analysts

UCPATH is a sophisticated tool used to manage employee records, pay, and benefits. The actions required to ensure accurate information is maintained, compliance is met, and employee pay and benefits are correct can be complicated. To assist department Analysts with understanding academic transactions and best practices, AP continues to update and create resources that can be found at: <https://ap.ucsb.edu/resources.for.department.analysts/ucpath/>.

- **New** Physical Work Location Resource (AB-119 Compliance):
 - [Maintaining Location and Cubicle Information in UCPATH](#) provides guidance on entering and maintaining the fields required to ensure AB-119 compliance.
- **New** UCPATH AP Hiring Resources:
 - [Hire Template Decision Guide](#) provides a walk through of the questions departments should answer to determine the best Template and Reason Code to use for academic Hire transactions.
 - [Academic Hire Template Job Aid](#) provides step by step instructions and tips for entering information into academic Hire templates.
- Other Helpful Resources:
 - [End Date Monitoring](#) provides guidance on actions steps departments should take to manage appointments with approaching end dates.
 - [Understanding UCPATH Resources](#) provides an overview of all of the UCPATH Resources available, and the navigation and links to access Job Aids, User Productivity Kits (UPK's), UCSB UCPATH Website, Reports, and more.

Lecturer Appointment Review

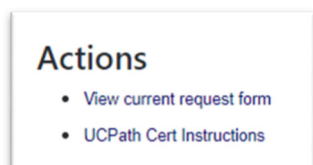
Please review the UCPATH appointment set up for your department Lecturer population (FTE, Dates, & Pay Components) to ensure the 2/1/22 IX pay increase, and spring appointment set up is correct. Please email ap-path@ucsb.edu if any issues are identified.

UCPATH Certification Form on AP Folio

Did you know? Departments are able to request certain UCPATH related actions via the **UCPATH Certification and Input Form** located on AP Folio (<https://ap.ucsb.edu/~ucpath.certification.and.input.requests/>):

- **One Time Additional Pay** for *Honoraria, Faculty Consultant or Recruitment Allowance* payments
- **Short Work Break** for Lecturers
- Removing the **End Job Automatically** checkbox to stop a position from terminating erroneously
- Updating the **Reports To, Location, or Cubicle** data points for AB119 compliance (including ASE Multi-Headcount Positions)
- **Release to Grant** requests
- Requesting new **Summer Additional Compensation** positions
- Requesting **Emeritus** positions for retiring faculty

Detailed instructions for how to complete the form can be found under the **Actions** menu within the Cert page.



Addressing Employee Benefit Issues

Programming in UCPATH for benefits eligibility is very complicated; changes to an employee's existing appointment or adding or transferring to a new appointment can sometimes lead to benefit issues in the system. This could be based on a timing issue, a system limitation, or it could be that the appointment changes justifiably led to a benefits eligibility change.

When a change to an employee's appointment is approved and being input into UCPATH, the employee and department should review employee benefit enrollments in the system after the change appears in UCPATH. Common scenarios where benefits may be impacted include:

- Multiple appointments in the system:
 - With FTE changes applied to one or all appointments where the primary job (auto-derived) changes
 - Where one position is put on Short Work Break
 - Where the appointment end date was not extended on time
- "Transfer" to a new position with a new benefit eligibility group
- Retroactive changes
- Timing of Termination/Hire transactions

For additional guidance on identifying and troubleshooting benefits issues in UCPATH, refer to the [Job Aid: Benefit Eligibility & Triggers](#).

If a benefits issue is identified, the employee should create a Case with UCPC (using the "Ask UCPATH" button) to have benefits eligibility reviewed and issues addressed. Departments can initiate the request on the employee's behalf if they are unable to initiate the request themselves.

- Topic: Benefits
- Category: Benefits Election Inquiry
- Subject: Benefits Ended in error – please review and update asap (include any urgent note if there is an immediate medical need).

If there is an urgent need for care, the Case/Inquiry number can be emailed to AP-Path@ucsb.edu requesting escalation. (Escalation requests just mean that we can ask for expedited processing based on an urgent need. All issue management is still occurring at the UCPATH Center.)

Training Opportunities:

The next **UCPATH Training** is scheduled via Zoom for May 2nd through 5th. Many things have changed since UCSB went live in 2018, and existing users are encouraged to participate as a refresher. Please watch for when these trainings are available in UCSB's Learning Management System to sign up. <https://www.ucpath.ucsb.edu/training>

In addition, the AP Office is holding the annual training and workshop classes for **Leaves** and **Additional Compensation**. Department staff responsible for the UCPATH actions related to leaves, additional pay (honoraria, faculty consultant, or recruitment allowances), and Summer Research Compensation are encouraged to attend. Additional detail and registration links can be found at <https://ap.ucsb.edu/~staff.training.registration/>.

- **Academic Leaves:** *Wednesday, 3/9/22 – 9:30-11am*
- **Academic Leaves Workshop:** *Wednesday, 3/16/22 – 9:30-11 am*
- **Additional Compensation:** *Wednesday, 4/6/22 9:30-11:30 am*
- **Additional Compensation Workshop:** *Wednesday, 4/13/22 9:30-11:30 am*

Other Resources: Walking the UCPATH

UCSB UCPATH teams have implemented a weekly email that provides tips, tricks, and helpful topics to department Initiators and Approvers. You can access the content of these training resources on the UCSB UCPATH webpage.

<https://www.ucpath.ucsb.edu/transactional-users/job-aids-handouts-and-resources>

Walking the UCPATH: Tips and Topics

02/16/2022	<u>Walking the UCPATH: Tips and Topics - Retroactive Changes</u>
02/10/2022	<u>Walking the UCPATH: Tips and Topics - PAY CYCLE CHANGES + FLSA MISMATCH</u>
02/10/2022	<u>Walking the UCPATH: Tips and Topics - ACTION + ACTION REASON CODES</u>
01/27/2022	<u>Walking the UCPATH: Tips and Topics - Position Control Requests (STAFF)</u>
01/21/2022	<u>Walking the UCPATH: Tips and Topics - Data Corrections</u>