

TO: UCPATH Functional Users, Business Officers and AP Analysts

FR: UCSB Academic Personnel Office

RE: AP UCPATH—2023 Winter to Spring Reminders and Best Practices

Lecturer Appointments

Please review the UCPATH appointment set up for your department 9/9 Lecturer population to ensure the spring appointment set up effective 4/1/23 is correct.

- Pre-Six 1-year term appointments:
 - Verify FTE is correct for spring teaching appointments
 - Identify 1-year term appointments that do not teach after winter quarter and initiate the Termination template effective 4/1/23 (LDW 3/31/23)
- Continuing and Pre-Six multi-year term appointments:
 - Verify FTE is correct for spring teaching appointments
 - Verify SWB is applied for those with non-teaching quarters in spring
- Email ap-path@ucsb.edu if any UCPATH set up issues are identified.

A new [Lecturer SWB Matrix](#) is available on the AP UCPATH website to help departments identify the proactive action necessary to partner with AP and ensure proper set up of these records in UCPATH.

UCPATH Set Up and Changes for New Union Contracts

With the implementation of 4 new union contracts, and the new union set up of GSR's, UCOP and UCPC are working on the system set up and changes to reflect the new and updated terms of the contract.

- The Range Adjustment for Postdocs will be implemented in UCPATH by early April. AP will be completing a full review of the changes to ensure the increases are properly applied to all Postdoc Employee, Fellow and Paid Direct appointments.
- The set up of a new Union Code for GSRs is in process at the system-wide level. Implementation information is still pending, but we are hopeful that the Union Code and Employee Relations Codes on GSR appointments will be managed via a systemwide process. Information will be shared as it is available, and departments will be informed of any action they will be required to take.
- The Range Adjustment for ASE and GSR titles is also scheduled for early April.
 - To ensure records update as part of the systemwide process, departments should:
 - Review the Data Warehouse *Jobs by Group* report
 - Confirm appointment data points are correct (Salary Admin Plan & Grade), and that the Expected Job End Date has been extended (through spring quarter - active or SWB)
 - Take action to extend or correct data points as needed
 - During the systemwide updates applied to employee records, departments should not initiate PayPath transactions during the following freeze dates:
 - ASE titles: April 1st-5th
 - GSR titles: April 6th-11th
 - **the freeze does not apply to Smart HR Template transactions or SWB transactions*
 - Following the freeze dates, it is recommended that departments validate changes were correctly applied to employee records

We understand departments are eagerly awaiting additional guidance, and your patience is greatly appreciated while we await systemwide information on contract implementations for each group. Information will be shared as soon as it is available.

Maintaining Physical Work Location in UCPATH

Departments are responsible for ensuring all represented employee's physical work location is up to date in UCPATH to ensure compliance with AB-119. Guidance on reviewing and maintaining these fields for academic employees can be found on AP's website - [Maintaining Location and Cubicle Information in UCPATH](#). Best practice is to include office and cubicle details in the **Cubicle** field.

End Date Monitoring

Appointments with expired end dates create unintended issues (overpayments, delays in processing system-wide actions, and slows down payroll processing runs at UCPC). To reduce impacts, departments should be monitoring academic employee and contingent worker records in UCPATH, and taking proactive action:

- Guidance on managing employees with Expected Job End Dates is available on the UCPATH section of AP's website - <https://ap.ucsb.edu/resources.for.department.analysts/ucpath/end.date.monitoring.pdf>
- Contingent Workers (CWR) can now be set to auto-terminate at the time the record is added in UCPATH – guidance can be found on UCSB's UCPATH website via a recent communication from UCPC - <https://www.ucpath.ucsb.edu/news/ucpath-notice-end-job-automatically-check-box-contingent-worker-job-record-end-dates>

Addressing Employee Benefit Issues

The UCPATH system is programmed to derive employee benefits eligibility automatically. Changes to an employee's existing appointment or adding or transferring to a new appointment may lead to benefit issues. This could be due to a timing issue, a system limitation, the appointment changes may have justifiably led to a benefits eligibility change.

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 corrective action related to benefits is managed by the UCPATH Center.)

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

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:

- Existing Resources can be found at: <https://ap.ucsb.edu/resources.for.department.analysts/ucpath/>.
- **NEW:** [Course Buy Out Job Aid](#) provides guidance on how to manage course buy out and release to grant requests.

Hire Templates: Creating a New Record vs Using an Existing Record

Did you know? The Hire template used determines if a new record is created, or an existing record is used.

- The **New Hire** and **Concurrent** Hire templates will create a brand-new employee record in UCPATH
- The **Rehire** and **Transfer** templates will place the new employee appointment onto an existing inactive employee record.

It is important to consider when to add a new record versus when to “stack” a new appointment on an existing record:

- Create a new record (via New Hire or Concurrent Hire):
 - When hiring a new employee to UC, or new to UCSB (Full Hire template with appropriate Reason Code)
 - When hiring a former UC Employee who is a new employee to your department (Full Hire template– with appropriate Rehire Reason Code)
 - When adding a second appointment (Concurrent Hire template and Reason Code)
 - When hiring from another campus via the Inter-Campus Transfer process
 - When transferring an academic employee from one department to another (Concurrent Hire template and Intra-Transfer reason code)
- Use an existing record (“stack” onto an inactive record via Rehire or Transfer):
 - To Rehire an employee into an existing inactive record in your department (Rehire template with appropriate Reason Code)
 - To Transfer a staff employee from an active appointment to a new appointment (Transfer template; may also be used with ASE’s when transferring within the same department)

**Note: when a department uses a Rehire Template and selects an employee record that IS FROM A DIFFERENT DEPARTMENT, this prohibits the former department from viewing their appointment history on that record and taking any corrective action such as a salary cost transfer.*

Refer to the [Hire Template Decision Guide](#) for a walkthrough of the questions departments should answer to determine the best Template and Reason Code to use for academic Hire transactions.

Training Opportunities:

The next **UCPATH Training** is scheduled via Zoom for May 9th through 12th. System upgrades and process changes occur regularly in the UCPATH system, and existing users are encouraged to participate as a refresher. Enrollment is through UCSB’s Learning Management System. <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 Workshop: Wednesday, 3/15/23 – 1:30-3pm**
- **Additional Compensation: Wednesday, 4/5/23 2:00-4pm**
- **Additional Compensation Workshop: Thursday, 4/13/23 1:30-3:30 pm**