May 1, 2019

To: UCPath Initiators in Academic Units, Business Officers and Academic
            Personnel Analysts (via SBADM-L)

From: Cindy Doherty, Director
            Academic Personnel

Re: Summer Research Additional Compensation Toolkit

As recently announced in the annual Additional Compensation workshops, there are a
number of changes regarding faculty summer research additional compensation this year
due to the transition from PPS to UCPath. To assist campus users with summer
research additional compensation processing, the attached toolkit has been developed.
The toolkit is also posted on the Academic Personnel website under Resources for
Departmental Analysts/Sumer Research Additional Compensation Toolkit. Along with the
toolkit you may also review the April 11, 2019, Additional Compensation Workshop
session on the Academic Personnel web site.

Summer salary for Deans will be initiated by the Academic Personnel office. Summer
Session teaching appointments will be managed by the Summer Sessions and Academic
Personnel offices.

We are investigating the option of labs or drop-in workshops to assist campus initiators
with summer compensation processing. More information will follow once a schedule is
available.

Questions regarding summer research compensation may be directed as follows:
Summer compensation policy: Helly Kwee helly.kwee@ucsb.edu
                                  Andrea Dittman andrea.dittman@ucsb.edu

UCPath processing: AP Path AP-Path@ucsb.edu

We appreciate your cooperation and understanding as we move into this next phase of
implementation.

****

Cindy Doherty
Director
UCSB Academic Personnel
(805) 893-8332
Cindy.Doherty@ucsb.edu

<u>Summer Research Additional Compensation Processing</u>

1. Establish positions to support the summer compensation job(s).
   - The main funding unit requests positions from Academic Personnel via the [UCPath Certification and Input Request](#) form on the Academic Personnel web site (sign on required to access the form.) It is strongly recommended that the main funding unit request all positions at one time. However, individual requests for positions may continue to be made throughout the summer via the form. All positions will by default be set to 1.00 FTE. The individual submitting the request will be informed via email when the positions have been created.
   - Vacant positions can be monitored via the datawarehouse EZ Access report *Vacant Position.* Positions created this year can be left vacant throughout the academic year and reused next summer. Positions that might have been created during conversion last September can be used, but will need to be checked carefully to assure all attributes are correct. Alternatively, upon request Academic Personnel can inactivate unused vacation positions if it is clear they will not be used in the future.
2. Hire the faculty member into the position.
   - Using the concurrent hire template, the faculty member is hired into one of the vacant positions at the appropriate rank. *[see Attachment A: Summer Research Additional Compensation Decision Matrix]*
   - Check the end job automatically check box, with an expected job end date appropriate for the months of pay expected on the job.
   - In the comments indicate "Summer Research Compensation concurrent hire."
   - Verify that the concurrent hire has been fulfilled by the UCPath center.
3. Perform a Paypath transaction to adjust the FTE and change the earn code from REG to ACR.
   - In the comments indicate "Summer Compensation for the month(s) of ____ at _____ FTE.
   - By default, all hires include REG pay. In order to pay ACR, a paypath transaction is required. *[see Attachment B: Summer Research Additional Compensation Job Aid]*
4. Enter funding information
   - Using the funding entry page, enter funding for the period of summer compensation. If capped funds will be used *[see Attachment C: Summer Research Additional Compensation Funding]*
   - At this time a program defect exists in UCPath that will not allow capped funds to be used without the "cap gap" being funded as well. As soon as this defect is corrected, a special training session will be held for units that process capped funds. We will share this information as soon as possible.
5. If the same position will be used for future months with different FTE and/or funding, the future dated actions may be entered via additional Paypath transactions.

Summer Research Additional Compensation
Decision Matrix

Scenario	Qualifier	Comments
June summer comp	All	Can be set up any time since there are no pay impacting actions prior to July 1. Use current compensation rate, pay period of June 1-June 30
July-September summer comp	Newly hired faculty July 1	The summer compensation position can be created and concurrent hire completed, but paypath actions cannot be processed until after July 1 when the job is active.
	Faculty member has no pending or approved merit/promotion July 1	The summer compensation position, concurrent hire, and paypath transactions can be completed. Use the current rank, step and compensation rate.
	Faculty member has a merit/promotion July 1 that has been approved.	The summer compensation position, concurrent hire, and paypath transactions can be completed. Use the July 1 approved rank, step and compensation rate.
	Faculty member has a merit/promotion July 1 that is pending (not yet approved)	If the summer compensation position and job are initiated prior to July 1, the merit/promotion will have to be manually applied to the position/job once approved. It is recommended that the department wait until after the merit/promotion has been approved to process the summer compensation.
Application of July 1 range adjustment	Entered into UCPath prior to range adjustment (projected to be end of June/early July)	Any summer compensation entered prior to the application of the range adjustment will have the range applied. If trying to pay an exact dollar amount, further adjustments to the FTE may be required post-range adjustment.
	Entered into UCPath after the range adjustment.	Input at the post-ranged compensation rate.
Originally set up for one month, now want to extend	If current postiion/job is still active.	Enter a paypath action to change the expected end date. Then make other changes (FTE, funding) as necessary.
	Summer comp position is inactive, job has been termed.	A case must be submitted to UCPC to rehire/reinstate. Then make other chagnes (FTE, funding) as necessary.
Retroactive changes	Summer comp position/job is still active.	Enter a paypath correct. Retro pay will be automatically generated.
	Summer comp position is inactive, job has been termed.	A case must be submitted to UCPC to make changes to a terminated job.

PayPath Component
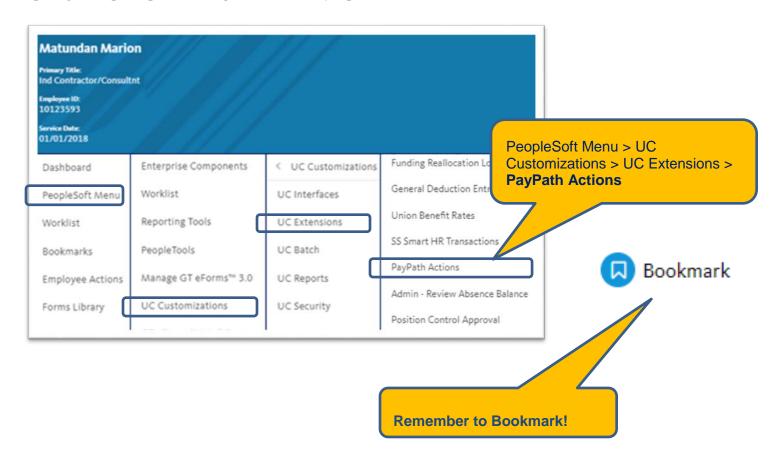# Job Aid: Summer Research Additional Compensation

Getting Started

UCPath enables you to update employee data for the following job related pages: **Position Data**, **Job Data**, and **Additional Pay**.

NOTE: This job aid is specific to UCSB Summer Research Additional Compensation. Please contact ap-path@ucsb.edu with questions.

Transactions initiated and approved in the **PayPath Action**s component are written directly onto the data base and onto the UCPath employee data pages. These transactions do not route to the UCPath Center for processing. Please review your transaction thoroughly.

Begin by navigating to the **PayPath Actions** page.

PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**

Bookmark

Remember to Bookmark!

PayPath Component
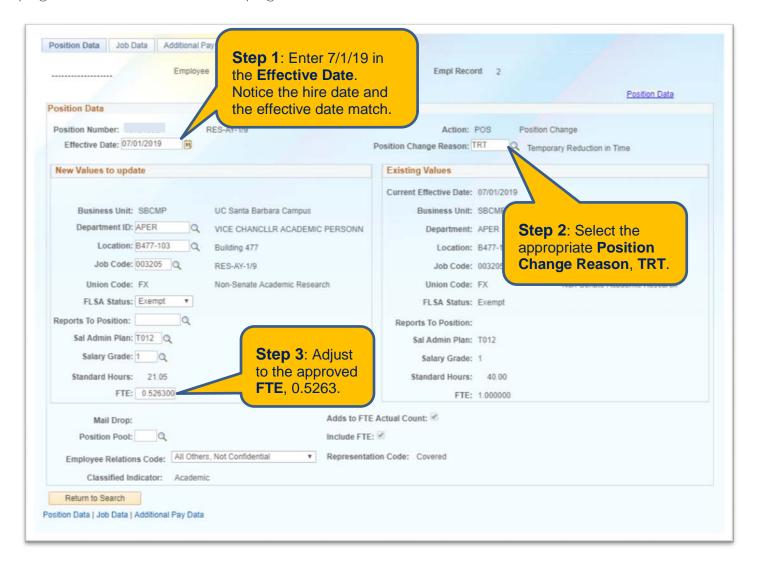# Job Aid: Summer Research Additional Compensation

Position Data Page

Use the **Position Data** page to update an employee's position information. In this example an employee requests 10 days of Summer Research Additional Compensation to be paid in July 2019.

Step 1: Enter the **Effective Date** for the first month of Additional Comp. You may only choose from the following payroll dates; 6/1/19, 7/1/19, 8/1/19, 9/1/19. Service dates are tracked offline by the hiring department.

Step 2: Select the appropriate **Position Change Reason**, either **TRT** or **TIT**. For descriptions of the **Position Change Reasons** please see Job Aid: PayPath Transactions—Action Codes, Reason Codes and Descriptions (Academic).

Step 3: Update the **FTE** field with the approved FTE. Updating the FTE will insert a row into the **Job Data** page. Proceed to the **Job Data** page to continue.

Step 1: Enter 7/1/19 in the **Effective Date**. Notice the hire date and the effective date match.

Step 2: Select the appropriate **Position Change Reason**, TRT.

Step 3: Adjust to the approved **FTE**, 0.5263.

PayPath Component
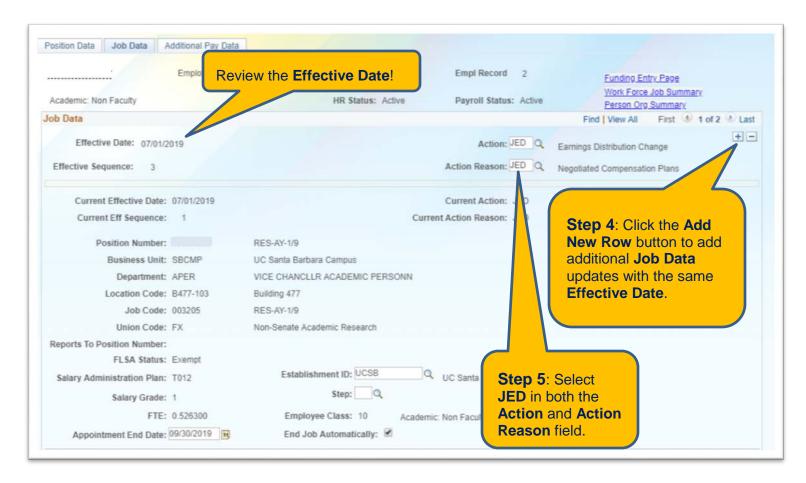# Job Aid: Summer Research Additional Compensation

Job Data Page

Upon entering this page verify the **Effective Date**. If the date is not correct, please cancel your action and start over. The steps below are continued from the previous page.

NOTE: Steps 4-8 will only need to be entered once to the Summer Salary Researcher job record. If future changes to FTE are needed, only steps 1-3 are required.

Step 4: Once in the **Job Data** page, click the plus sign to add a new **Action**.

Step 5: Enter **JED** for the **Action** and **Action Reason Code**. If another **Action/Action Reason** code is selected you will not be able to complete the succeeding steps. Scroll to the bottom of the **Job Data** screen to continue.

PayPath Component
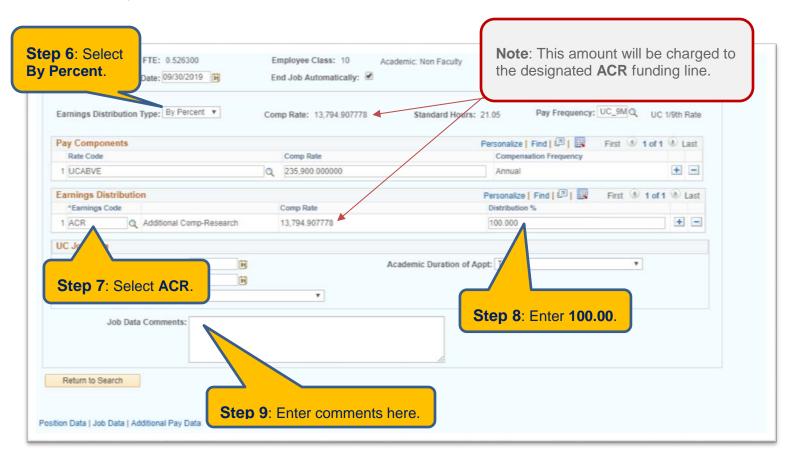# Job Aid: Summer Research Additional Compensation

Job Data Page

Step 6: In the **Earnings Distribution Type** field select **By Percent**. This will make the **Earnings Distribution** section editable.

Step 7: In the ***Earnings Code** field, select **Additional Comp-Research (ACR)**.

Step 8: Enter **100.00** in the **Distribution %** field. This will assign the **Comp Rate** to the ACR Earnings Code. This field requires the percent value, 1.0 will not pay correctly.

Step 9: Enter **Job Data Comments** directed to the Academic Personnel UCPath Team. Example: Summer compensation for the month(s) of [month(s)] at [FTE value].
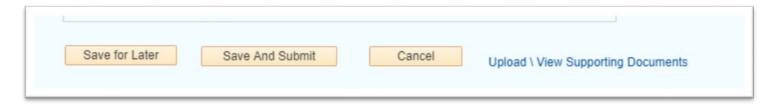

Step 6: Select **By Percent**.

Note: This amount will be charged to the designated **ACR** funding line.

Step 7: Select **ACR**.

Step 8: Enter **100.00**.

Step 9: Enter comments here.

PayPath Component
Job Aid: Summer Research Additional Compensation

Additional Pay Page

No entry required for this page. The options below will appear at the bottom of the Additional Pay page once you have navigated through each of the tabs of the PayPath component.

If you need to save your work to return to it later, click the **Save for Later** button. Otherwise, please go back and review the changes you have made, everything looks good? Great! You have now completed entering your transactions, click the **Save and Submit** button to route your transactions for review and approval to the AP Path team. Once approved by the AP UCPath team, you can confirm your updates on the Job Data Component or Work Force Summary.

Navigation: PeopleSoft > Workforce Administration > Job Information > **Job Data**

Navigation: PeopleSoft > Workforce Administration > Job Information > Review Job Information > **Workforce Job Summary**

Another Month of Additional Comp?

To enter another month of Summer Research Additional Compensation follow the steps above excluding steps 4-8. No JED entry is needed since the ACR Earnings Code will continue until it is removed from the job.

Questions

Please contact the Academic Personnel team at ap-path@ucsb.edu with questions.

Summer Research Additional Compensation Funding

Distribute funding on ACR lines. Add additional lines as needed if multiple funding sources. Total ACR distribution must equal 100. Leave the REG line blank (no distribution)

Options for summer salary from various funding sources during the same pay period:

- Single position with funding handled via the funding entry page. Lead unit handles input of all funding.
- Multiple positions, one for each fund source or one for all funding sources managed by a single unit. Units need to coordinate to assure total is not over monthly or summer limit.

Options for summer salary in excess of 1.00 FTE (July and August only, up to allowable limit):

- One position at 1.00, second position at amount equal to the additional 1-4 days (for 20-23 day months)
- Multiple positions at FTE that reflects the amount coming from each fund source or unit. Still cannot exceed the monthly limit.