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

## UCPath Actions for the New Academic Year

### AP-Path Deadlines:

To ensure transactions are input in **UCPath** and/or approved by AP-Path by the payroll deadlines, please submit transactions and **AP-Folio UCPath Certification and Input** forms by the AP Deadlines.

| MO Paycheck Date | AP-Path PayPath Transaction Deadline | AP-Path One Time Pay & Template Transaction Deadline |
|---|---|---|
| Friday, July 1st | Tuesday, June 21st at 10am | Wednesday, June 15th at 10am |
| Monday, August 1st | Wednesday, July 20th at 10am | Friday July 15th at 10am |

### Prioritization of Actions:

Transaction processing for the new academic year are prioritized as follows:

1. Base pay impacting appointment revisions
2. June/July Terminations/Retirements
3. 7/1/22 Hires
4. Benefit impacting transactions
5. Summer Salary transactions
6. Additional Compensation (Stipends and OTP)
7. Other Job Data changes

### Lecturer Appointment Workloads – AP Deadline: June 24th at 5pm:

Following Dean approval, Lecturer workloads are post-audited by the central AP Policy team. To ensure time for post-audit and UCPath entry by the July payroll deadline, Lecturer workload/appointment approvals must be received in AP by **5pm on June 24th**.

Paperwork received in AP after the deadline may not be entered in time for the July paycheck. Departments are responsible for monitoring **Job Data** and employee paychecks to determine when additional action is needed to correct pay issues resulting from late entry in UCPath. Once the correct data attributes appear in **Job Data,** missed or over payment tickets should be initiated with BFS via ServiceNow, as needed.

### Termination & Retirement Processing

When an employee separates from UC:
- Process the **Termination Template** in a timely manner to reduce the risk of overpayment and ensure the COBRA process is initiated on the separation date to facilitate a smooth benefits transition.
- Process the **Retirement Template** by the June pay deadline and according to the guidance RASC has provided to the employee to ensure pay calculations are correct and a smooth transition to retirement pay and benefits. Employees eligible for the *Cost of Living Adjustment (COLA)* increase and retiring at the end of June must be retired one day prior to July 1, with a minimum of one business day not on active HR or Payroll status to receive the COLA. Refer to the Retirement Processing for July 1 Retirement Date – COLA for guidance.
- Request **Final Pay** via BFS ServiceNow if the employee is in an accruing title or leaving employment mid-pay cycle. *(Final Pay is not required for academic non-accruing employees separating at the end of a term.)*
- Direct the employee to update their contact information prior to leaving UC, *including adding a personal email address (marked as primary)* to facilitate ongoing access to their UCPath records via the former employee portal. (Access to view historical payroll records, W2's, and create a Case with UCPC if issues arise.)

- Provide the employee with the UCOP link on how to set up former employee portal access - https://ucnet.universityofcalifornia.edu/compensation-and-benefits/ucpath-former-employees.html

## Requesting/Hiring into Emeritus

For retiring faculty eligible for Emeritus status:
- Request an Emeritus position via the AP Folio UCPath Certification and Input Request form.
- Upon receipt of the new position number, follow the steps in the Job Aid: Emeriti Processing for July 1 Retirement Date UPK.

## Merit and Promotion Entry into UCPath

Merit and promotion outcomes for academic employees are entered centrally via batch uploads during June and July. Departments should review **Job Data** prior to July payroll deadline to confirm data points are correct; if issues are identified, email ap-path@ucsb.edu. *Note: Late decisions (finalized after 7/20/22) entered into UCPath **after** the July payroll deadline will be paid automatically on the next on-cycle check following UCPath entry via the Retro-module.*

## Unit 18 – 9/12 Appointment Averaging

Under the new IX contract, the FTE input into UCPath for 9/12 AY lecturer appointments must reflect the yearly average of the appointment workload. FTE will no longer be entered based on quarter by quarter workload fluctuations. When reviewing appointment setup in UCPath, validate that the FTE effective 7/1/22 through 6/30/23 aligns with the overall average on the appointment approvals. *Note: process changes to address how FTE averaging impacts midyear modifications/early end of appointments are still under review. Guidance will be provided as new practices are identified.*

## AB119 Compliance: Work Location and Reports To in UCPath

Departments are responsible for maintaining accurate and up to date **Location**, **Cubicle** and **Reports To** information on all represented employees in UCPath to ensure compliance with AB119. Under SB270, noncompliance can result in significant monetary penalties against the University under. Guidance on updating UCPath records is on the AP website (https://ap.ucsb.edu/resources.for.department.analysts/ucpath/maintaining.location.cubicle.in.ucpath.pdf) and the UCSB UCPath website (https://www.ucpath.ucsb.edu/ab-119-work-location-update-guide-represented-employee).

## End Date Monitoring

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.

## End Job Automatically Checkbox

Departments are able to select the **End Job Automatically** checkbox in the original **Hire** transaction for academic employees. When selected, the position will auto-terminate as of the end date of the appointment. Use of this checkbox does not collect important separation reasons necessary for reporting purposes and in determining eligibility for unemployment benefits; can create delays in Final Pay processing; and if not properly monitored, can lead to erroneous termination resulting in unintended employee pay and benefit impacts.

To avoid unintended impacts, the **End Job Automatically** checkbox should only be used in specific scenarios:
- Academic Student Employees where the appointment is ending.
- Temporary academic term appointments (e.g. Augmentations, Supplemental assignments)
- Visiting appointments
- Summer Compensation jobs
- Release to Grant Research title appointments

In order to collect the most accurate separation reason information and avoid erroneous terminations, all other population separations should be processed as a **Termination** (voluntary or involuntary) or **Retirement** template.

## Auto-Termination Box Process Change Effective 6/1/22:

- Hire templates that include the auto-termination box checked that **do not** fall into the above categories will be denied with instruction to resubmit the template without the box checked.
- Departments must proactively process **Termination** templates with the **Reason Code** that best aligns with the separation reason. (See Template Transactions – Action Reason Codes and Descriptions for **Reason Code** details.)

*Note: As reappointments and modifications are processed, the checkbox will be removed on existing records that do not fall into the above listed scenarios. Departments can also request the check be removed via the UCPath Certification and Input Request form on AP Folio.*

## Short Work Break

Short Work Break (SWB) changes an employee's Payroll Status to *Inactive* to stop pay during a break period while keeping their HR Status as *Active*. This allows departments to avoid terminating and rehiring when the eligible employee is expected to return to work within a certain period of time; this also allows benefit eligible employees to continue on UC benefits with direct billing through UCPC. Refer to the *Short Work Break Matrix* to determine eligibility.

### Academic Student Employees:

Use SWB to place a position on hold through the summer when a student employee is expected to return to a position in the fall. This will allow the employee to easily return the student to work, and allows Summer Session and other departments to hire these students into summer positions using the **Concurrent Hire** function. If the student does not return to the department position in the fall, initiate a **Termination** template to end the job.

### Lecturers:

Use SWB for 9/9 Lecturer appointments during summer months to stop pay from being issued. Departments must submit SWB requests via the AP Folio UCPath Certification and Input form. SWB may also be applied for non-working quarters or to mitigate certain pay impacts. Please see the SWB: Lecturer Best Practices Job Aid for detailed guidance.

## Summer Salary

The *Additional Compensation* training and workshop classes presented by Academic Personnel provide detailed information on Summer Salary processes and practices; department analysts responsible for processing Summer Salary should refer to the recorded sessions  as well as the following resources for guidance:

- Detailed UCPath Job Aids, including the **Action Steps** document with links to all available resources by category, can be found at ap.ucsb.edu > Resources for Department Analysts >Summer Research Additional Compensation Tool Kit. https://ap.ucsb.edu/resources.for.department.analysts/ucpath/
- Questions related to the management of summer compensation may be directed as follows:
  - Policy and procedure:  Mira Lázaro Mira.Lazaro@ap.ucsb.edu, or Lia Cabello  lia.cabello@ucsb.edu
  - UCPath processing:  AP-Path@ucsb.edu
  - Funding Entry: BFS ServiceNow

## Administrative Stipends

All EVC approved administrative appointments and stipends are provided directly to the AP-Path team for processing, including Position, Hire/Termination & Additional Compensation actions. Detailed information on the stipend process and how to review information in UCPath can be found on the AP website under Resources for Department Analysts > UCPath -  https://ap.ucsb.edu/resources.for.department.analysts/ucpath/academic.stipends.in.UCPath.pdf

Departments are responsible for the following actions related to Administrative Stipends:

- Managing funding entry
- Verifying Additional Pay data is correct, and notifying AP-Path of any issues
- Following up on any pay issues with BFS, as needed

## New Resource!

The **Job Data** and **Workforce Job Summary** components provide the details of an employee's *current*, *future* or *historical* employment status. These components contain the same information in different formats. A new Job Aid, UCPath Job Data and Workforce Job Summary, that provides an overview of each component to help departments determine which view will best meet their needs for data review on an employee job record is now available in the "For Transactional Users" section of the UCSB UCPath website. *Note: transactors can view employees in these components based on their security access (the departments you are provisioned to view and transact on). To view general employee information for records outside of your security access (other departments on campus, or across UC), please use the Person Org Summary component.*