

To: UCPath Functional Users, Business Officers and AP Analysts in Academic Units (via SBADM-L)

From: Amy Arnold, AP UCPath Manager

Re: UCPath Reminders and Updates: Academic Transactions, Processes and Resources

Deadlines and Prioritization of Actions

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 for Academic Non-Students by the [AP Deadlines](#).

MO Paycheck Date	AP-Path PayPath Transaction Deadline	AP-Path One Time Pay & Template Transaction Deadline
Monday, July 1	Thursday, June 13 at 10:00 am	Monday, June 17 at 5:00 pm*
Thursday, August 1	Wednesday, July 17 at 10:00 am	Monday, July 22 at 10:00 am

*Due to the June 19th holiday, the deadline was updated to allow Academic Personnel additional time to process the appointments.

Prioritization of Actions:

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

1. Base pay impacting appointment revisions
2. June/July Terminations/Retirements
3. 7/1/2024 Hires
4. Benefit impacting transactions
5. Summer Salary transactions
6. Additional Compensation (Stipends and OTP)
7. Other Job Data changes

Department Actions

Termination & Retirement Processing

Departments are responsible for processing **Termination** and **Retirement** templates for employees who are separating from UC. Managing these actions proactively ensures that COBRA and Retirement processes are initiated, facilitates a smooth benefits transition, and ensures employees are not overpaid. Guidance on initiating *Templates*, directing employees to update personal contact information, setting up *Former Employee Portal* access, managing *Final Pay*, and requesting *Emeritus* positions can be found on the [Terminations and Retirements](#) Job Aid on the AP website. Additional information is located on the Job Aid: [Retirement Transaction Process for July 1 Retirement Date](#).

Emeriti Processing Following Retirement

Per the Job Aid: [Emeriti Processing Following Retirement](#), the addition of an Emeriti appointment should occur effective after a one-day break in service. This one-day break in service is necessary for various reasons to support compliance and processing of the Retirement Plan, and Retirement Savings Program, and is especially important for July retirements and the Inactive COLA. Once an employee is hired via a UCPath transaction into an Emeriti appointment in UCPath, the individual will not be on pay status so would not be required to complete the Form I-9.

If the Emerita/us employee is appointed into a paid appointment, they will be prompted to complete the I-9 as required by the USCIS. According to USCIS Handbook for Employers M-274, if you rehire the employees within three years from the date you completed their previous Form I-9, you may complete a block on Supplement B (also known as Section 3), Reverification and Rehire, or you instead complete a new Form I-9. Given the nature of an Emeriti, it is likely that the person completed their Form I-9 more than 3 years from the date of this new appointment (or may not have a Form I-9 on file if the hire date was before 1986). Therefore, the individual will need to complete a new Form I-9 in Tracker when

the paid status appointment is added consistent with the USCIS requirement of having a completed I-9 on file for any appointment receiving pay.

End Date Monitoring

Departments are responsible for monitoring appointments with upcoming end dates and taking appropriate action to extend continuing appointments, terminate 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.

Use of the **End Job Automatically** checkbox is limited to truly temporary appointments, such as ASE, Augmentations and Supplements, Summer Salary, Visiting, and Release to Grant Research. To collect the most accurate separation reason information and avoid erroneous terminations with pay and benefit impacts to employees, all other population separations should be proactively processed as a **Termination** (voluntary or involuntary) or **Retirement** template, with the **Reason Code** that best aligns with the separation reason. (See [Template Transactions – Action Reason Codes and Descriptions](#) for **Reason Code** details.)

Hiring New and Returning Employees

Departments will receive Hiring instructions from ap-path@ucsb.edu after (1) the appointment approval is finalized, (2) the post-audit is completed by the AP Policy Analyst, and (3) the position updates are applied in UCPATH. Guidance for processing Hire transactions is available on the AP Website under the [UCPATH AP Hiring Resources](#) bullet.

Note: July 1 is an exceptionally busy time for appointment processing; actions are processed in the order they were received. Please limit questions on the status of processing to only the most critical. This allows the central teams to focus on the actions needed to process appointments before the July pay deadline.

Lecturer Appointments

Workload Processing Deadline: June 17 at 5:00 pm

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 with a 7/1/2024 effective date must be received in AP by **5:00 pm on June 17**.

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 overpayment tickets should be initiated with BFS via [ServiceNow](#), as needed.

Lecturer: Department Actions and Job Aids

Departments are responsible for reviewing their Lecturer appointments in UCPATH and taking the appropriate action, as needed. AP has developed resources available on [AP's website](#) to assist departments with thinking through the actions needed to manage this population, links below.

- [Hiring and Termination - Lecturer Best Practices](#)
- [Short Work Break - Lecturer Best Practices](#)
- [U18 Short Work Break Decision Guide](#)
- [Lecturer SWB Matrix](#)

AP-Path Actions:

- 9/12 Job Codes: Reappointments and modifications (e.g. FTE updates) will be applied following AP Workload post-audit; 9/12 actions are prioritized and processed in the order received.
- 9/9 Job Codes: *2023/2025 Two-Year Term Appointments* will be placed on SWB over summer; updates for 2023/2024 will be applied following AP Workload Post-Audit.

Department Actions:

- **Terminate** 9/9 Job Codes in 2023/2024 *One Year Term Appointments* via an **Involuntary Termination** template with (Appointment Expired) Reason Code (effective date 7/1/2024; Last Day Worked 6/30/2024); per the contract, 9M appointments must be terminated and rehired under the new term appointment when there is a break in service between appointments.
- **Validate** Two Year Term Appointments to confirm all data is accurate.
- **Request SWB** for 9/9 Continuing Job Codes for summer via [AP Folio](#) UCPATH Certification and Input form

Note: Priority is given to pay impacting actions for July Payroll; set up for 9M appointments will be prioritized closer to the first active working quarter.

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. 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>).

Academic Student Employees (ASE)

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 *Active*. Departments can 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 allows 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.

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](#)

Central AP Actions

Merit and Promotion Entry into UCPATH

Merit and promotion outcomes for academic employees are entered centrally via batch uploads during June and July. Departments can review **Job Data** before the July payroll deadline to confirm data points are correct; if issues are identified, email ap-path@ucsb.edu. *Note: Late decisions (finalized after 7/19/24) 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.*

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!

New training resources for Approvers are now available on AP's [Training Materials page](#) under the UCPATH section. Approvers play a crucial role in catching transactional issues, avoiding errors that lead to employee pay and benefit issues, and ensuring timely processing of actions in UCPATH.