Date: May 23, 2023

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

From: Tamara Berton, 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
Friday, June 30th	Tuesday, June 20th at 10am	Wednesday, June 14th at 10am
Tuesday, August 1st	Thursday, July 20th at 10am	Monday, July 17th at 10am

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. 7/1/23 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 ensure employees are not overpaid. Guidance on initiating *Templates*, directing employees to update personal contact information and set 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 regarding Retirement dates and processing deadlines related to the end of the academic year can be found at https://www.ucpath.ucsb.edu/news/ucpath-reminder-july-1-retirements-and-cola-eligibility.

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.

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. In order 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) post-audit is completed by the AP Policy Analyst, and (3) the position updates have been 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. Use of discernment to limit questions on the status of processing to only the most critical is appreciated. This will allow the central teams to focus on the actions needed to process appointment set up by the July pay deadline.

Lecturer Appointments

Workload Processing Deadline: June 23rd 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 with a 7/1/23 effective date must be received in AP by **5pm on June 23rd**.

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.

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: *22/24 Two-Year Term Appointments* will be place on SWB over summer; updates for 23/24 will be applied following AP Workload Post-Audit.

Department Actions:

- **Terminate** 9/9 Job Codes in *22/23 One Year Term Appointments* via a **Involuntary Termination** template with (Appointment Expired) Reason Code (effective date 7/1/23; Last Day Worked 6/30/22); per the contract, 9M appointments must be terminated and rehired under the new term appointment when there is a break in service between appointments.
- **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 as *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 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.

Transition to Single Headcount Positions

Reminder – ASE appointments must be managed in *Single Headcount Positions* starting in fall 2023. Guidance on this transition can be found in the May 8th memo to campus.

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** 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.*

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.