

July 18, 2018

To: PPS Preparers and Reviewers (via PPS-L)

From: Cindy Doherty, Director, Academic Personnel
Cynthia Seneriz, Director, Human Resources

Re: Preparation for UCPATH (follow-up to June 19th communication)

In preparation for the campus transition to UCPATH this fall, the campus will need to take a uniform approach to PPS data input and updates over the next several months. This update includes new guidance on *freeze periods in PPS and UCPATH, Fall quarter student hiring, and future dated appointments/distributions* in PPS.

Freeze periods in PPS and UCPATH

During September there will be periods of time when departmental preparers will have no access to PPS or UCPATH to enter/update appointment information. We anticipate the following freeze periods:

- **No system access to enter transactions for MO paid employees between August 31st and September 9th.** A snapshot of the MO paid employee data set will be taken from PPS on August 31st to be used in the conversion process to UCPATH. No further access to PPS will be available for updates to MO paid employees after the snapshot is taken.
- **No system access to enter transactions for BW paid employees between September 14th and September 21st.** A snapshot of the BW paid employee data set will be taken from PPS on September 14th to be used in the conversion process to UCPATH. No further access to PPS will be available for updates to BW paid employees after the snapshot is taken.
- For payroll impacting transactions, a brief window is expected to open for manual data entry into UCPATH by central campus offices (AP, HR, and BFS) **between September 9th and September 12th, and again on September 19th only, to allow data entry updates to both MO and BW paid employee records that must be processed for the October 1st and October 3rd payroll.**

Although these dates may still shift somewhat, we are sharing this information early so that you can begin to plan hiring and appointment/distribution updates before and after these system freeze periods. More information will be shared in the coming weeks.

Fall student employment

The implementation of UCPATH will occur during one of the busiest hiring periods of the year for student employment. In order to support the smoothest transition possible, Human Resources and Academic Personnel have worked together to develop guidance for the uniform processing of student employment transactions that typically take place in

September. Our guidance differentiates scenarios where appointment/distribution updates can be entered in PPS prior to the snapshot dates, and if not, how these updates will be handled after the snapshot dates. Please refer to the attached Fall Student Employment Scenarios matrix and follow the instructions below.

- **For students who worked in Spring quarter and will work again in Fall quarter:**
 - Identify which scenario (1 through 4) applies to the student hire and follow the instructions based on whether the “Fall quarter appointment can be established in PPS before the snapshot date” or the “Fall quarter appointment was NOT established in PPS before the snapshot date.” The majority of hiring situations involving returning student employees should be covered by one of these four scenarios.
- **For students who are employed now (or during Summer quarter) and another job will be added for Fall quarter:**
 - Follow the instructions for scenario 5 or 6. If the department learns of additional employment after the snapshot date, the additional job will be entered in UCPath using the methodology under the column titled “Fall quarter appointment was NOT established in PPS before the snapshot date.” We expect this to be a relatively small population.
- **For students who are new hires and have not previously worked at UCSB:**
 - Follow the instructions for scenario 7 or 8. When possible, departments are encouraged to update PPS with the new hire appointment *before* the snapshot date, using scenario 7 or 8 as a guide.
 - If it is not possible to process the new hire before the snapshot date (e.g., the student will not be available to complete new hire paperwork prior the snapshot date), the new hire transaction must wait until the UCPath system is open for data entry input. In light of the narrow window during the conversion period for data entry to UCPath, Human Resources and Academic Personnel are working to identify a process where mass uploads to UCPath can accomplish the data entry that would normally be transacted within departments during this conversion period in September. More information about the mass hire processes will be shared in the coming weeks.

FLSA exemptions and pay cycle changes to keep in mind:

- **Dual FLSA status and pay cycles in our current PPS:** In current state PPS, an employee may hold multiple jobs with conflicting FLSA (exempt/non-exempt) status’ and may be paid on both the BW and MO pay dates. In UCPath, an employee may be assigned *only one FLSA status*, regardless of the number of concurrent appointments, and will *be paid on a single pay cycle*. During the conversion period in September, the majority of the FLSA and pay cycle conflicts at UCSB will involve student employees, and Human Resources and Academic Personnel will be required to designate the FLSA status and the pay cycle where

conflicts exist. Beginning in October, departments will be responsible for resolving conflicts, with the assistance of Human Resources and Academic Personnel, as new concurrent appointments are entered in UCPATH. Expanded instructions will be provided to departmental staff before go-live.

- **Readers and Remedial Tutors** are to be hired on a Bi-weekly basis if the Reader/Tutor is the only title OR if there is a concurrent Student Assistant title (i.e. TC 4922).
- **Future Solutions:** Human Resources is working with Office of the President to develop two *new exempt* Student Assistant title codes for special concurrent employment situations. These new exempt title codes would be used when the student holds an exempt graduate student title (TA/Associate/GSR/Reader/Tutor) with a concurrent Student Assistant title (i.e., TC 4922 in our current state). This approach would allow the graduate student appointment and the student assistant appointment to be paid on the MO, but maintain hourly compensation for the student assistant job based on the hours worked. Since the new title codes are not yet been approved, departments will continue to use TC 4922, STDT 1, until the new title codes become available. The campus will be notified when the new title codes are available.

Future dated actions

During the conversion of PPS data into UCPATH, there may be some future dated appointments or distributions that do not convert correctly. To minimize the possibility of errors during the conversion process, it is recommended that departments do **NOT** enter the following types of updates into PPS prior to the conversion snapshot dates and hold them for data entry into UCPATH *after* conversion.

- Winter and Spring appointments for TAs or Associates who will be on the four month basis in Fall (i.e. enter the Fall appointment only)
- Academic leaves beginning Winter quarter 2018 (effective 11/1) or later
- Funding changes effective after the PPS snapshot date
- Changes in percent time effective after the PPS snapshot date

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Preparation for UCPATH: Fall Student Employment Scenarios
July 16, 2018

Hiring Scenario		When the Fall quarter appointment can be established in PPS before the snapshot date*	When the Fall quarter appointment was NOT established in PPS before the snapshot date*
1	Student was separated in PPS. Employment status = S.	If the employee is returning to work in the same department, reverse the separation action in PPS and then enter the new appointment/distribution (no new hire paperwork is required). Fall appointment will convert to the UCPATH system. Otherwise, the department rehires the employee in PPS according to current practice (new hire paperwork is required).	The employee's most recent appointment information and separated status will be converted into UCPATH. The department will need to submit a Rehire template transaction in UCPATH and complete the required new hire paperwork. (Note that the freeze periods will impact the availability and timing of the UCPATH system to submit the Rehire template transaction.)
2	Student was separated in PPS. Employment status = S. Fall appointment is already entered into PPS.	No action required by the department. Fall appointment will convert to the UCPATH system.	n/a
3	Student is inactive in PPS. Employment status = I.	If the employee is returning to work, add the Fall appointment/distribution in PPS in accordance with current practice (no new hire paperwork is required). Fall appointment will convert to the UCPATH system.	The employee will convert in UCPATH with a status of Short Work Break. HR and AP will coordinate a mass upload to return employees from Short Work Break status during the conversion period. Otherwise, the department will need to submit a PayPath transaction in UCPATH to return the employee from a Short Work Break (no new hire paperwork is required). (Note that the freeze periods will impact the availability and timing of the UCPATH system to submit the PayPath transaction.)
4	Student is inactive in PPS. Employment status = I. Fall appointment is already entered into PPS.	No action required by the department. Fall appointment will convert to the UCPATH system.	n/a
5	Student has active appointment and the hiring department will be adding a second appointment for Fall quarter. Employment status = A. Additional appointment is already entered into PPS.	No action required by the department. Fall appointment will convert to the UCPATH system.	n/a
6	Student has active appointment and the hiring department will be adding a second appointment for Fall quarter. Employment status = A.	Add the secondary appointment in PPS in accordance with current practice. Both appointments will convert to the UCPATH system.	The department will need to submit a Concurrent Hire template transaction in UCPATH. (Note that the freeze periods will impact the availability and timing of the UCPATH system to submit the concurrent hire template transaction.) FLSA and pay cycle overrides may be necessary if the multiple jobs result in conflicting FLSA and/or pay cycles.**
7	New hire, no previous UC employment. Fall appointment is already entered into PPS.	No action required by the department. Fall appointment will convert to the UCPATH system.	n/a
8	New hire, no previous UC employment.	Hire the employee in PPS in accordance with current practice (new hire paperwork is required.) Fall appointment will convert to the UCPATH system.	Where applicable, HR and AP will coordinate a mass upload to hire employees into the UCPATH system during the conversion period. Otherwise, the department will need to submit a Full Hire template transaction in UCPATH. (Note that the freeze periods will impact the availability and timing of the UCPATH system in order to submit the Full Hire template transaction.)

*PPS snapshot dates assumed to be 9/14/2018 for BW and 8/31/2018 for MO

**Concurrent appointments must have a single FLSA status and single pay cycle