

August 19, 2019

To: UCPath functional users who manage academic employees (via SBADM-L)

From: Cindy Doherty, Academic Personnel Director

Re: Updates regarding processing of academic employee transactions

As we approach the end of our first year on UCPath, we are beginning to prepare for Fall quarter activities. The transition from Summer to Fall will be the last “new” experience in UCPath and we hope that what we have learned over the past year will make it a smooth transition. A new KTS workshop is being planned for early September to discuss upcoming activities and to share some of what we have learned over the past year. Details will be shared once available. In the mean-time we know that departments are already beginning to work on fall activities, in particular graduate student hiring. We are sharing this information to help you begin this work, but also encourage you to attend the September KTS.

Fall student employment

Four-month basis fall hires

To hire (initial hire, rehire or concurrent hire) an academic student employee on the four-month basis be sure to do the following:

- Use an effective date of September 1, 2019.
- Override the default comp frequency on the job from UC_9M to UC912.
- In the **template comments** (on the personal data tab) cut and paste the following statement:
 - **UCSB Exception approved by Maryann Eagan: ASE's at UCSB will be hired on duration a four-month with a frequency of (9/12)**
- Using this exact language will cause the transaction to be recognized as a UCSB four-month pay job and you will be much less likely to encounter problems. If you use different language, or do not include comments, the transaction may be denied by the UCPC.
- Remember to either auto-term the job as of December 31, 2019 or to add a future dated action to change the comp frequency back to UC_9M for Winter quarter effective January 1, 2020.

If returning the student from short work break (SWB) into a four-month position, all of the above apply as well.

Summer SWB:

Students who were placed on SWB over the summer will either need to be returned to active service, termed, or extended on the SWB.

- If the student will not be returning to the job in Fall or Winter quarter, end the job by either updating the position end date and checking the auto-termination box, or processing a termination template. If the expected end date has already passed, a termination template will have to be submitted.
- If the student will not return to the job in Fall, but will return in winter, extend the SWB through December 31, 2019.
- If the student will return to the job, complete a return from SWB transaction. Adjust the FTE or other attributes as necessary to reflect appropriate employment for Fall quarter. **Note:** Please review the Person Organizational Summary and remember to coordinate with other departments if the employee holds multiple jobs to assure no pay cycle or FLSA conflicts exist.

Due to a UCPath defect, the SWB was inadvertently deleted from some positions when the FTE was converted to 0. In these cases, a return from SWB is not necessary. All other steps listed above still apply.

October 1 pay increases

Pay increases will be implemented on October 1, 2019 for Senate Faculty and for Academic Student Employees. More information will be shared once the details of the pay increases are finalized.

In preparation for the increase, departments are encouraged to review expected end dates for ASE and either extend or terminate as explained above. Student employees with end dates of September 30 or earlier in UCPath will not be range adjusted. Academic Personnel will be doing targeted outreach to departments with large numbers of expired end dates, but all departments are encouraged to review ASE jobs.

Additional items to review

Pre-Six Lecturer Appointments – workload/re-appointment paperwork continues to trickle in to Academic Personnel, and we are entering updated information in UCPath as it is received. This process is paper-driven, and therefore more difficult to track that actions processes via AP Folio. Please follow the attached instructions to review the job records for your Lecturer population to ensure all appointments are correct in the system, and to reduce under- and over-pay situations.

Administrative Stipends – Stipends provided to faculty for additional work in administrative roles are processed centrally. Most were input in time for the July payroll, however there were a small number of late submissions that did not meet the deadline. Employees who did not receive their July stipend will receive payment on the August

paycheck. Departments are able to review stipend entry on the *Additional Pay* tab on the *PayPath* action. If issues are noted, please email Tamara Berton at tamara.berton@ucsb.edu.

Summer Salary – Due to a system defect, summer salary that was correctly submitted by the campus was in some cases defaulted to REG pay rather than ACR. Please review your Summer Salary pay journals to ensure that the appropriate Earn Code (ACR) was used. If the incorrect Earn Code was utilized, the tax and benefits deductions are most likely incorrect. The Earn Code will need to be updated on the Job record, and a case will need to be submitted to the UCPATH Center noting that the pay was incorrectly coded and pay should be re-calculated to reflect the ACR Earn Code.

Postdoc Hire Transactions Reminder: The *Post Docs Anniversary Date* field on the *Job Data* tab is required. Many transactions have been received with this field left blank. Please be sure to review your transactions for completeness prior to submission.

Disappearing Data on Transactions: There have been a few transactions where data entered is “disappearing” once the action has been submitted to AP-Path. It appears that if an Approver attempts to fix a data entry error on a transaction, this does not always “stick.” Approvers, if you identify an error, please deny the transaction so the initiator can re-enter with the correct attributes.

System down-time in August and September

Due to the upcoming transition of UCD, UCPATH will be unavailable during two periods in September.

UCPATH will be unavailable the following time:

Friday, August 30, 5:00 pm through Wednesday, September 4, 6:00 am

Thursday, September 12, 5:00 pm through Tuesday September 17, 6:00 am

Transactions that require Academic Personnel initiation or approval must be submitted to Academic Personnel by September 17, 2019 at 10:00 am to impact the October 1 check.

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

Lecturer Appointments – Department Audit & AP Notification Process

Lecturer Appointments –To ensure all Fall appointments are correct in the system, and to reduce under- and over-pay situations, please review your approved Lecturer appointments, and complete the following steps:

1. Review UCPATH Job Records for your Lecturer population, confirming:
 - a. The appointment has been extended where applicable.
 - b. The pay is correct based on any merits, promotions and range adjustments.
 - c. The FTE is correct for Fall quarter, and SWB's are in place when applicable.

2. Submit Termination Templates for any appointments that are showing as active, but the incumbent will not be continuing in the 19/20 AY.

3. Create a spreadsheet and list any appointments where additional follow up with AP is required. Please include the Employee Name, Employee ID#, Position # and a note regarding the issue.
 - a. For positions not updated in UCPATH where paperwork has been provided to Academic Personnel:
 - i. If approval/revision paperwork was submitted to AP prior to August 5th, please note "Paperwork to AP on (date); not in UCPATH."
 - ii. If approval/revision paperwork was submitted to AP after August 5th, please continue to monitor UCPATH for data entry, and notify AP-Path via email after 7 business days.
 - b. If the records in UCPATH do not match the approved appointment/workload paperwork on file, please note the necessary correction (e.g. Fall '19 FTE should be 33% per original workload approval).
 - c. Send the spreadsheet with all issues listed to AP-Path@ucsb.edu with the subject line "Lecturer Appointment Corrections – (Department Name)"

4. For appointments that were not corrected in time and were incorrectly paid in July, once the job record is correct in UCPATH, please follow the correct process for Over, Under and Missed Payments:
 - a. **Overpayments:** Process through BFS ServiceNow. Please notify the employee of the overpayment and that further instructions will be forthcoming.
 - b. **Underpayments:** If pay has previously been issued on the job record, the retro-module will automatically pay the owed amount on the following paycheck.
 - c. **Missed Payments:** If a job in UCPATH has NOT received pay previously (newly hired into that position), submit a Missed Payment through BFS ServiceNow to initiate payment.