Date: August 21, 2023

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 for Fall

## Fall Student Employment

### Four-month basis fall hires

Academic student employees paid on the four-month basis during fall must:

- have a start date effective 9/1/2023, and
- have the *Comp Frequency* in *Job Data* changed from *UC_9M* (the default setting) to *UC912*.

These appointments should either be set to auto-terminate at the end of fall quarter, or if they are expected to continue, the *Comp Frequency* must be changed back to *UC_9M* effective 1/1/2024. Additional guidance is available on the AP Website.
https://ap.ucsb.edu/resources.for.department.analysts/graduate.student.appointments/ase.4.month.pay.in.fall.pdf

### Multi-Headcount Positions

Effective 10/1/23, multi-headcount positions are no longer an option for Academic Student Employees. Please review your appointments carefully and ensure that all academic students are set up in Single Headcount Positions on or before 10/1/23. Once Multi-Headcount positions are vacant, departments can initiate a **Position Control Request** to change the headcount to "1" and use these positions for future Hires. Questions can be sent to ap-path@ucsb.edu.

### ASE/GSR Range Adjustments

The Range Adjustment for all ASE and GSR titles effective 10/1/23 will be applied centrally by the UCPath Center via a system-wide process. To ensure the new pay attributes are applied, departments should review existing end dates and extend all appointments that are expected to continue through fall quarter.

*GSR, Reader and Tutor Titles:*
The appropriate **Grade** and **Step** should be input on the appointment. The Range Adjustment will apply the new rates based on the existing appointment set up.

*Teaching Assistant and Associate Titles:*
The **Salary Admin Plan** and **Grade** will be changed via the system-wide update process. To gather the correct **Step** and account for any **Top Up** amount to be applied, departments will receive a spreadsheet and instructions on how to provide this information to AP to be included in the upload process. This will be provided to departments by early September. Employees on the 4-month pay basis will also be managed via this process.

*Freeze Dates:*
Effective 9/29/23 through 10/5/23, a Freeze will be in place:

- Do not Initiate or Approve any **PayPath** transactions. Any existing PayPath transactions in the Worklist for the ASE/GSR titles on 9/29 should be cancelled and can be reinitiated *after* the freeze.
- **Hire** and **Position Control** transactions may be processed during the freeze. Note – upon fulfillment, departments will need to review pay data elements, and take corrective action, as needed.

## Summer Short Work Break (SWB)

Students who were placed on SWB over the summer will either need to be returned to active service, terminated, 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 *End Job Automatically* box, or processing a termination template.
- If the student will not return to the job in fall but is expected to return in winter, extend the SWB through 12/31/2023.
- If the student will return to the job in fall, complete a [return from SWB transaction](#). Adjust the FTE and other data points as necessary to reflect appropriate employment data attributes 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.

## Academic Non-student Employees

### Lecturer Appointments

Lecturer appointments are updated in UCPath as appointment approvals are finalized and post-audit instructions are received from the Policy team. Departments should be utilizing **Data Warehouse** reports and reviewing **Job Data** to ensure appointment set up in UCPath aligns with what appears in the Approval Memo's as the corresponding payroll deadlines for the new appointments approach.

- 9/12 appointment FTE is now averaged over the course of the academic year under the requirements of the new contract. Late approvals/post audit may result in corrective pay action back to 7/1/23.
  - SWB should not be applied to this population unless in consult with the AP-Policy analyst.
- 9/9 Continuing Appointments:
  - Departments should have proactively requested SWB be applied via the *UCPath Certification and Input* form in AP Folio to avoid overpayment during summer months.
  - Once new workload/post-audit instructions are received for the new academic year, these employees will be returned from SWB at the start of their new working quarter, and any data attribute changes will be applied by the central team.
- 9/9 Pre-Six Appointments:
  - 1-Year Term appointments in 22/23 should have been terminated effective 7/1/23 due to a break in service dates between Term appointments.
    - Once new workload/post-audit instructions are received for the 23/24 academic year, departments will be sent instructions to Hire the employee at the start of the next working quarter.
    - If transitioning to 9/12, no Termination is needed, and updates will be applied centrally once post-audit instructions are received from the policy team.
  - 2-Year Term appointments in 22/24 should have been placed on SWB automatically over summer. Once new workload/post-audit instructions are received for the 23/24 academic year, UCPath set up will be completed by the ap-path team.
  - New Term appointments for 23/24 will follow the standard appointment approval/post-audit process. Once new workload/post-audit instructions are received for the new academic year, departments will be sent instructions to hire the employee at the start of the next working quarter.

**Department Actions:**
- Review *Job Data* to confirm that the appointment attributes are correct; email [ap-path@ucsb.edu](mailto:ap-path@ucsb.edu) of any issues.
- **Retroactive changes** may require a ServiceNow ticket to BFS/Payroll for any over- or missed-payments:
  - *Pay increases are picked up by the retro-module and automatically pay on the next on-cycle check.*
  - *FTE changes require a ServiceNow ticket with BFS to address over or missed payments.*
  - *New Hires processed after the pay deadline require a ServiceNow ticket with BFS to initiate missed pay.*

Additional resources regarding Lecturer appointments and processes can be found on the AP website:
- [Short Work Break - Lecturer Best Practices](#)
- [U18 Short Work Break Decision Guide](#)

- End Date Monitoring

## Merit and Promotion Cases

Merit and Promotion Cases are input into UCPath via a mass upload process over the course of the summer:

- Cases approved by the July Payroll Deadline were uploaded into UCPath and appeared on employee paychecks.
- Cased approved *after* the July Payroll Deadline will be processed as approvals are finalized. The retro-module will pick up any pay owed back to the July 1 effective date automatically; no action needed by the department.

Departments are encouraged to review **Job Data** for all Merit and Promotion Cases that are finalized. If data issues are identified, email ap-path@ucsb.edu so review/correction can be initiated.

## Summer Salary

Summer Salary positions should be set to auto-terminate following the final payment on the job record. Departments can initiate a PayPath transaction to update the **End Job Automatically** checkbox using the TMF Action Reason. Additional resources on Summer Salary can be found in the UCPath section of the AP Website.
https://ap.ucsb.edu/resources.for.department.analysts/ucpath/

## Use of End Job Automatically Checkbox

Reminder: Use of the End Job Automatically 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.

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. 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*.

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.)

## Maintaining Location and Reports To for AB119 Compliance

Departments are responsible for ensuring that the physical work location and reporting information in UCPath remains up to date to meet union reporting requirements under AB119. Best Practice is to review these data points regularly, and update any time there are changes. This is especially important for employees who are covered by a Collective Bargaining Agreement. For more information on how this information is updated for Academics, please review Maintaining Location and Cubicle Information in UCPath.

## Academic Administrator Stipends

Stipend payment set up for faculty receiving additional compensation for campus Administrator, Director, or Committee work roles are processed centrally. (Departments are responsible for managing funding entry.) Please see the Academic

[Administrators Stipends Job Aid](#) in the UCPath section of the AP website ([https://ap.ucsb.edu/](https://ap.ucsb.edu/)) for additional information on how to view stipends in UCPath.

## Other UCPath Information

### UCPath Help and Resources:

UCPath is a robust and complicated system, but there are many resources available to assist transactional users with understanding the steps to manage UCPath transactions successfully:

- Directly in the UCPath System (with login):
  - o The yellow "Ask UCPath" button is available when you are logged into the UCPath system; use the search box to look for resources by topic or keyword.
  - o Navigate to *Help/FAQ > Location Users* to access a repository of system job aids & action walk throughs.
- UCSB Campus Resources:
  - o UCSB UCPath Website provides general UCPath information as well as links to campus training materials and job aids. [https://www.ucpath.ucsb.edu/](https://www.ucpath.ucsb.edu/)
  - o The UCPath section of the AP Website provides specific guidance on academic processes in UCPath. [https://ap.ucsb.edu/resources.for.department.analysts/ucpath/](https://ap.ucsb.edu/resources.for.department.analysts/ucpath/)
  - o UCSB holds instructor-led quarterly trainings for transactional users; existing users are encouraged to attend to refresh skills and see walk-throughs of system changes. [https://www.ucpath.ucsb.edu/training](https://www.ucpath.ucsb.edu/training)
- New Job Aids Available:
  - o The [ASE Transaction Resources](#) under the *Other Resources* section of the Graduate Student Appointment section of the AP Website provides Action Steps and links to all available resources for managing UCPath transactions for Academic Student titles.

Following the review of the resources available, specific questions regarding academic processes and transactions can be emailed to [ap-path@ucsb.edu](mailto:ap-path@ucsb.edu).

### The AP Folio UCPath Certification and Input form

The **UCPath Cert & Input** form is a tool that department analysts can use to request UCPath actions from the central AP-Path team. Requests include *One Time Additional Pay, Short Work Break, Update Existing Reports to* or *Location Code, Release to Grant,* and *Summer Salary Position* requests. Refer to the **UCPath Cert Instructions** within the Cert request page for detailed instructions. [https://ap.ucsb.edu/~ucpath.certification.and.input.requests/](https://ap.ucsb.edu/~ucpath.certification.and.input.requests/)

### Hire Templates: Social Security Number & Date of Birth

An employee's Social Security Number (SSN) and date of birth (DOB) are used for benefit and retirement enrollments and should be included in the Hire template to avoid downstream impacts to employee pay and benefits. When an employee does not have a SSN, departments can initiate the Hire template without this information, but a note regarding the pending issuance of the SSN must be included in the Comments box for UCPC. As soon as a SSN is issued to the employee, it is critical that this is input into the UCPath system. Updates to SSN & DOB can be input via a [Personal Data Change HR Template](#) or Employee Self Service [DOB Update](#) or [SSN Update](#).