

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 9/1/2022, 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 1/1/2023. 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>

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 12/31/2022.
- 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 7/1/22. (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 that will continue in the 9/9 frequency in the new year should have terminated at the end of their 21/22 appointment.
 - 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.

- These appointments should terminate when there is a break in service at the end of their term appointment, and rehire once a new term appointment is approved.

Department Actions:

- Review *Job Data* to confirm that the appointment attributes are correct; email 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](#)
- [Unit 18 Contract Updates & Toolkit \(2022\)](#)
- [End Date Monitoring](#)

Academic Administrator Stipends

Stipend payment set up for faculty receiving additional compensation for campus Administrator, Director, or Committee work roles are processed centrally. (Please note, departments are responsible for managing funding entry.) Most additional pay actions were input in time for the July paycheck, however there were a small number of late submissions that did not meet the payroll deadline. Administrators who did not receive their stipend on the July paycheck will receive payment on the August paycheck. Please see the [Academic Administrators Stipends Job Aid](#) in the UCPATH section of the AP website (<https://ap.ucsb.edu/>) for additional information on how to view stipends in UCPATH.

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](#).

Other UCPATH Information

Fluid Improved Navigation (FIN) Project

UCPATH will have a new look for elevated users (transactional initiators and approvers) beginning in October; this change allows for a more adaptable experience across mobile devices and sets the stage for future system improvements. While the appearance and navigation functionality is changing, the actual transactional work remains the same. To learn more about this project, view the presentation video, and access resources available to facilitate a smooth transition to this new platform, please visit the FIN Project webpage at [UCPATH Fluid Navigation](#).

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):
 - 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.
 - Navigate to *Help/FAQ > Location Users* to access a repository of system job aids & action walk throughs.
- UCSB Campus Resources:
 - UCSB UCPATH Website provides general UCPATH information as well as links to campus training materials and job aids. <https://www.ucpath.ucsb.edu/>
 - The UCPATH section of the AP Website provides specific guidance on academic processes in UCPATH. <https://ap.ucsb.edu/resources.for.department.analysts/ucpath/>
 - 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>

Upon review of the resources available, specific questions regarding academic processes and transactions can be emailed to 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/>

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](#).