Date: Sept 13, 2023

To: UCPath Functional Users, Business Officers and AP Analysts

From: UCSB Academic Personnel Office

Re: 10/1 Range Adjustment -- ASE/GSR Titles

10/1 Range Adjustment – ASE/GSR Titles

The 10/1 Range Adjustment for all Academic Student titles where appointments are set up in UCPath before 9/29/23 will be managed via a systemwide process. Departments are responsible for reviewing the guidance below and taking the appropriate actions to ensure all appointments are set up correctly by the October payroll deadline.

Range Adjustment Freeze Dates: **9/29/23 through 10/6/23**

- PayPath transactions to extend or return appointments from SWB should be initiated and approved prior to the freeze; pending PayPath transactions not approved prior to the start of the freeze should be denied. Once the Range Adjustment is finalized, departments can initiate PayPath actions for additional updates, as needed.
- Hire transactions may continue to be initiated and approved during the Freeze. Note that these records will require additional review once the Freeze is lifted, and corrective action may be needed.

Graduate Student Researcher, Reader and Remedial Tutor Appointments

The Range Adjustment will be applied to all fall records set up in the system and active as of 10/1/23 prior to the freeze according to the terms of the union contract.

Department Action: Review existing appointments with end dates:

- Ending appointments should be set to auto-terminate using the *End Job Automatically* flag.
- Appointments extending should be extended prior to the Freeze dates listed above.

Teaching Assistant and Associate Appointments

The **Salary Admin Plan** and **Grade** will be updated via the system-wide process on all records active as of 10/1/23 that have been set up in the system prior to the freeze.

The new experienced based salary point (step) and Top-Up amount (if applicable) entry will be dependent on timing:

- Records that are in the system at the time the Preliminary Report is run by UCPC will be managed via a data collection and upload process. Departments will provide the data points via a Spreadsheet generated by AP.
- Records that are NOT identified in the spreadsheet referenced above will require additional action via PayPath or Position/Hire processing.

Please carefully review and follow the instructions below.

Rate Calculation Instructions:

As announced in the 8/15/23 memo *Guidance for Implementation of the GSR Collective Bargaining Agreement*, resources are available in the **File Resources** section of **GradPoint Academics**.

Identify the total annual, full-time equivalent rate applied to the fall appointment:
- the experience-based salary point (full-time, annualized)
- the top-up amount (full-time, annualized), *if applicable*

Example:

- *TA promised a 50% appointment with a total of **$35,000** in support for 3 quarters*
- *Full Time Equivalent of promised support = **$70,000** ($35,000*2)*
- *Experience Based Salary Point = **STEP 1** at $58,250*
- *Annualized Top-Up = **$11,750** ($70,000-$58,250)*

TA Steps:
- 1 $58,250
- 2 $59,998
- 3 $61,798

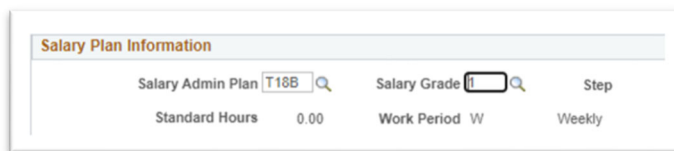## Data Collection Report – Records in UCPath included in UCPC Population Report

Set up for all fall **Teaching Assistant** and **Associate** appointments set up in UCPath on or before (9/12/23) will require Department action to identify the needed data points for upload. Spreadsheets and data collection instructions will be sent out separately to departments with active records as of the data pull date as soon as they are available.

Departments representatives must <mark>populate the spreadsheet with all required data points and return to AP by 9/22/23</mark> to ensure data updates are applied via the systemwide process.

Note: Employees hired AFTER the data pull (not included on the spreadsheet) must be updated by departments manually; see Hire and PayPath sections for detailed instructions, below.


Hire Transactions Processed After 9/12/23

For any Hires moving forward, departments must update positions with the new Salary Plan and Grade attributes, and Hire with the new Step and Off-scale (*if Top Up is applicable*):

- Initiate Position Control:
  - Effective Date = 10/1/23
  - Action Reason = COR
  - Salary Admin Plan =
    - Teaching Assistant T18B
    - Associate T19B
  - Grade = 1
  - Update any other position attributes as needed within the same transaction (FTE, Reports To, etc.)
  - Submit and wait for approval before initiating Hire
- Initiate the Hire per the normal process
  - Input all of the relevant data points for the Hire
  - Input the correct Step based on the experience-based salary point
  - If an off-scale is needed (due to Top Up amount)
    - Use the "+" to add a row
    - Input the UCOFF3 Rate Code
    - Manually input the off-scale amount
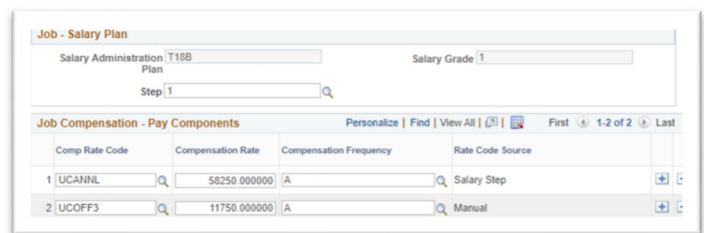
Corrections via PayPath AFTER Range Adjustment Freeze:

Once the system-wide Range Adjustment process has been completed, review ASE and GSR appointments in UCPath closely to identify if additional corrective action is needed.

<mark>NOTE: Corrective Actions via PayPath listed below can be initiated *AFTER* 10/6 (end of Range Adjustment freeze) and should be completed before the October payroll deadline of 10/24/23 at 5pm.</mark>

Correction to Sal Admin Plan and/or Grade with new Step

- **Position Tab**
    - Effective Date = 10/1/23
    - Action/Reason = POS/COR
    - Input the correct position elements:
        - Teaching Assistant
            - Sal Admin Plan = T18B
            - Grade = 1
        - Associate
            - Sal Admin Plan = T19B
            - Grade = 1
- **Job Data Tab**
    - Input the correct **Step** to auto-derive the **UCANNL** amount
    - Input a corrected **UCOFF3** rate, *if a Top Up amount is applicable*
        - Use the "+" to add a row
        - Input the **UCOFF3** Rate Code
        - Manually input the off-scale amount

Correction to Step or Offscale Amount only

- **Job Data Tab**
    - Effective Date = 10/1/23
    - Action/Reason PAY/REF
    - Input the correct pay elements
        - Input a new Step to derive the correct UCANNL, *AND/OR*
        - Input a corrected **UCOFF3** rate, *if a Top Up amount is applicable*
            - Use the "+" to add a row
            - Input the **UCOFF3** Rate Code
            - Manually input the off-scale amount