

September 20, 2017

To: Department Chairs and Directors (via SBCHR-L and SBDIR-L)

From: Cindy Doherty, Director
Academic Personnel

Re: Multi-unit Funded Appointments

In preparation for the campus transition to UCPATH, the Academic Personnel office has been reviewing our campus practices related to multi-unit funded academic employees. Multi-unit funded employees have jobs that are supported by funding from multiple campus units either concurrently or at various times during the course of the job. In UCPATH, an appointment (or "position") belongs to a single department and that department has responsibility for entering funding information for the position. This is a significant change from the current PPS configuration that allows alternate department access where each department manages its own share of the employee's funding. Multi-unit funded positions also present challenges for titles that have appointments, reappointments, and advancements processed via AP Folio.

In order to address the challenges in both AP Folio and UCPATH, we will be taking a new approach with multi-unit funded positions. The procedures will apply to individuals in series that are processed via AP Folio including:

- Researcher
- Specialist
- Project Scientist
- Academic Coordinator

Effective **November 1, 2017** each multi-unit funded position must be assigned a position home department (home department). The home department is defined as the unit that holds primary administrative responsibility for, and ownership of, the appointment/position¹.

The home department will be responsible for the processing of advancement cases and reappointments. If input is required from other units, it will be coordinated outside of AP Folio, and then submitted by the home department. Access to information in AP Folio will be limited to the home department, and employees will only show on the home department's eligibility list.

Departments are also encouraged to begin using a single appointment in PPS for these individuals. Each department can continue to enter their own distributions lines, but all distribution lines should be under a single appointment to the extent possible. Due to the limitations of PPS, if more than nine distribution lines are required, a second appointment will continue to be required. As we move closer to UCPATH implementation, further information about fund management in the new system will be shared.

While not required at this time, departments are also encouraged to apply these concepts to appointees in the Visiting Researcher, Visiting Project Scientist, and Postdoctoral Scholar series.

The Academic Personnel office staff will reach out to departments directly regarding employees who are currently multi-unit funded. If you are aware of employees who are currently funded by a single unit but over time will change funding units, you may also proactively identify the home department at this time. If a change in home department in AP Folio is required, please send either a memo or email with approval from both units to Joanna Kettmann at joanna.kettmann@ucsb.edu.

cc: Business Officers and Academic Personnel Analysts

¹Primary administrative responsibility normally includes, but is not limited to: responsibility for recruitment, appointment, modification, and advancement processes, and fiscal management for the position. The position home department may be modified if the administrative responsibilities will change for a year or more, or for the duration of the appointment.

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