

Summer Salary Action Steps

rev. 4/1/21

Step	Action Type	Actions	UCPath Component	UCPC Resources	Campus Resources	Questions
1	Position	Review existing positions; identify position numbers to use; identify position updates needed.	Vacant Budgeted Positions	View Vacant Budgeted Positions	DataWarehouse EZ Access Reports: Vacant Positions	ap-path@ucsb.edu
		Update positions; increase/decrease FTE; validate all other position data points.	Add/Update Position	View Position Information		ap-path@ucsb.edu
		Request new positions, if needed.	Position Control Request	Initiate Update Vacant Position Request	Summer Salary Position/Hiring Job Aid	ap-path@ucsb.edu
			AP Folio UCPath Certification		AP Folio UCPath Certification	ap-path@ucsb.edu
2	Funding	Review existing position funding; identify funding entry/updates needed.	Funding Entry Inquiry	View Funding Entry Inquiry Page		BFS ServiceNow
		Enter/update funding as needed.	Funding Entry	Submit New Position Funding Entry Request	Summer Salary Funding Entry	BFS ServiceNow
		Enter funding in MCOP, if fund source has Salary Cap: *Fund sources with Salary Cap require Hire be fulfilled and Job Record active before the Worksheet link is available on the Funding Entry page. *PayPath transaction to enter GAP must be entered prior to MCOP Worksheet entry.	Funding Entry: Salary Cap/MCOP Funding Worksheet	Submit New Position Funding Entry Request - MCOP	Salary Cap - Filling the Gap Job Aid Salary Cap - Not Filling the Gap Job Aid	BFS ServiceNow
3	Hire	Determine appropriate Hire template.	NA		Transaction Decision Matrix	ap-path@ucsb.edu
		Initiate hire template; submit for approval.	Smart HR Transactions	Initiate Concurrent Hire Template Transaction (Acad) Initiate Rehire Template Transaction (Acad)	Summer Salary Position/Hiring Job Aid	ap-path@ucsb.edu
		Validate Job Data once hire transaction is fulfilled by UCPC.	Job Data	View Job Data		ap-path@ucsb.edu
4	PayPath	Manage position and job data changes as needed:	PayPath Actions	Initiate Position Data + Job Data Change PayPath Transaction (Acad)	Summer Salary PayPath Job Aid	ap-path@ucsb.edu
		Update FTE for additional months	PayPath Actions	Initiate Position Data Change PayPath Transaction (Acad FTE Change)		ap-path@ucsb.edu
		Extend if additional months are added	PayPath Actions	Initiate Position Data + Job Data Change PayPath Transaction (Acad)		ap-path@ucsb.edu
		Update GAP for pay on fund sources with Salary Cap	PayPath Actions	Job Aid: Unpaid Cap Gap Processing	Salary Cap - Not Filling the Gap Job Aid	ap-path@ucsb.edu
		Update Auto Termination flag	PayPath Actions	Initiate Position Data + Job Data Change PayPath Transaction (Acad)		ap-path@ucsb.edu
		Correct JED if incorrect	PayPath Actions	Initiate Job Earnings Distribution PayPath Transaction (Acad)		ap-path@ucsb.edu
Update pay if M&P or Across the Board changes apply	PayPath Actions	Initiate Pay Rate Change PayPath Transaction (Acad)		ap-path@ucsb.edu		
5	Termination	Set position to auto-terminate (Expected Job End Date and Auto-Termination flag).	PayPath Actions	Initiate Position Data + Job Data Change PayPath Transaction (Acad)		ap-path@ucsb.edu
		Initiate Termination template, if not using Auto-Term process.	Smart HR Transactions	Initiate Voluntary Termination Template Transaction		ap-path@ucsb.edu
6	Missed/Over Pays	Work with BFS on any missed or over-payments, as needed.	NA			BFS ServiceNow

Other Scenarios:

Retroactive Actions:	For one month of retroactive pay:	Set the auto-term flag in the Hire transaction (upon fulfillment, record is inactive preventing erroneous future pay); work with BFS to issue pay.
	Multiple months of retroactive pay (2 options):	Set the auto-term flag in the Hire transaction (upon fulfillment, record is inactive preventing erroneous future pay); make following month FTE changes via UCPC Case; work with BFS to issue pay. Do not set the auto-term flag in the Hire transaction (upon fulfillment, record is active and must be terminated to prevent pay in current month); make following month FTE changes via PayPath; work with BFS to issue pay; terminate position prior to current months payroll.
*Salary Cap	Order of Actions (differs from above):	<ol style="list-style-type: none"> 1. Update Position 2. Hire 3. Input GAP via PayPath, if needed 4. Fund Position <p>MCOP Worksheet link in Funding Entry page does not appear until the employee Job Record is active. Employee compensation in MCOP Worksheet does not properly calculate until GAP is entered in PayPath, when applicable.</p>