

PayPath Component

Job Aid: Summer Research Additional Compensation

Getting Started

UCPath enables updates to employee job related data for **Position Data**, **Job Data**, and **Additional Pay** via **PayPath Actions**.

NOTE: This job aid is specific to UCSB Summer Research Additional Compensation. Questions specific to these transactions can be addressed to ap-path@ucsb.edu.

Transactions initiated and approved in the **PayPath Actions** component are written directly onto the UCPath database and immediately appear on the employee **Job Data** pages. These transactions do not route to the UCPath Center for processing.

Transactions should be reviewed thoroughly prior to submission to ensure accuracy and avoid pay related issues.

Navigate to the **PayPath Actions** page. (Traditional Navigation: **PeopleSoft Menu > UC Customizations > UC Extensions > PayPath Actions**)

The screenshot displays the 'HR Tasks' interface. On the left, a navigation sidebar is visible with the following items: 'Search for People', 'Person Organizational Summary', 'Contract Pay', 'PayPath & Additional Pay' (which is expanded to show 'PayPath Actions', 'Self Service Additional Pay', and 'Create Additional Pay'), and 'PayPath Actions'. A yellow callout bubble points to the 'PayPath Actions' link. The main content area is titled 'Search/Match' and contains a search form with the following elements: a 'Find an Existing Value' button, a 'Search Criteria' dropdown menu, 'Search Type' and 'Search Parameter' dropdown menus, an 'Ad Hoc Search' checkbox, and a 'Description' dropdown menu. At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The top right of the interface includes navigation icons for home, search, and help, along with a 'New Window | Help' link.

Fluid Navigation: *Workforce Administration > HR Tasks tile > PayPath and Additional Pay folder*

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Position Data Tab

Use the **Position Data** tab to update an employee's FTE related to their Summer Comp. In this example an employee requests 10 days of Summer Research Additional Compensation to be paid in July 2019.

Step 1: Enter the **Effective Date** for the first month of Additional Comp. You may only choose from the following payroll dates; 6/1/XX, 7/1/XX, 8/1/XX, 9/1/XX. Service dates are tracked offline by the hiring department.

Step 2: Select the appropriate **Position Change Reason**, either **TRT** (reduction) or **TIT** (Increase). For detailed descriptions of the **Position Change Reasons** please see [Job Aid: PayPath Transactions—Action Codes, Reason Codes and Descriptions \(Academic\)](#).

Step 3: Update the **FTE** field with the approved FTE. Updating the FTE on the **Position** tab automatically updates the information on the **Job Data** tab. Proceed to the **Job Data** tab to continue.

The screenshot shows the UCPath Position Data tab interface. It includes fields for Position Number (RES-AY-1/9), Effective Date (07/01/2019), Action (POS), and Position Change Reason (TRT). The interface is divided into 'New Values to update' and 'Existing Values' sections. Callouts provide instructions for each step: Step 1 points to the Effective Date field, Step 2 points to the Position Change Reason dropdown, and Step 3 points to the FTE field in the 'New Values' section. A separate box contains a reminder about effective dates.

Step 1: Enter 7/1/19 in the Effective Date.

Step 2: Select the appropriate Position Change Reason, TRT.

Step 3: Adjust to the approved FTE, 0.5263.

Remember: Effective Dates on position changes can only be used once. Additional position changes on the same effective date require a Case with UCPC.

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Job Data Tab

Step 4: Verify that all other data points are correct, including **Effective Date**, **FTE** (matches entry on the Position tab), **Appointment End Date**, **End Job Automatically** checkbox, **Earnings Distribution Type** (By Percent), **Pay Components: Rate Code(s) & Comp Rate(s)**, **Earnings Code** and **Distribution %**.

Corrections to any of the above data points can be made on the same transaction.

**If the Comp Rate does not align with the department calculations of Summer Compensation for that month, please verify if the pay rate(s) and FTE are correct on the transaction, and initiate any corrections needed.*

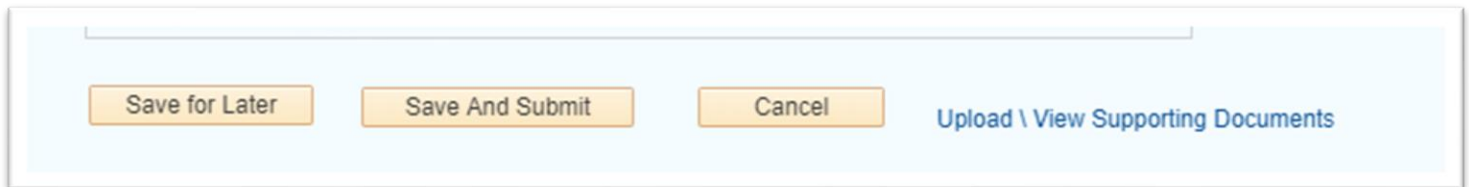
Note: Corrections to the **Earnings Distribution** fields require the use of the “JED” **Action** and **Reason Code**; see the *JED Corrections* section below for detailed instructions.

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Additional Pay Tab

No entry is required for this page. The options below will appear at the bottom of the **Additional Pay** page once you have navigated through each of the tabs of the **PayPath** component.



Step 5: Select the **Save and Submit** button to route your transactions for review and approval to the AP Path team. If you need to save your work to return to it later, select the **Save for Later** button.

Once approved by the AP UCPath team, updates can be viewed on the **Job Data** component.

Traditional Navigation: PeopleSoft > Workforce Administration > Job Information > **Job Data**
Fluid Navigation: Peoplesoft Homepage > HR Tasks file > Job Data Related folder > **Job Data**

Another Month of Additional Comp?

To enter an additional month of Summer Research Additional Compensation, follow steps 1 through 5 above for each month of Summer Comp to adjust the **FTE**, update salary components, or extend the appointment, etc. to set the record up for each month of additional compensation.

Terminating the Job

The **Expected Job End Date** and **End Job Automatically** checkbox should be set to automatically terminate the job record at the end of the Summer Research Additional Compensation. If the auto termination process is not utilized, the department will need to submit a **Termination** template.

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JED Corrections

NOTE: Summer Research Additional Comp **Hire** transactions include the **Earnings Distribution** data points and this should remain the same for the duration of the Summer Compensation appointment. The following steps are only necessary IF the JED information is incorrect (e.g. the **Earnings Code** defaulted to **DEF**), or to add Salary Cap/GAP (see [Job Aid Summer Salary - Not Filling the Gap](#)).

*The **DEF** code usually occurs when a record is updated via PayPath on the same day the Hire is fulfilled. Best practice is to hold any PayPath processing until the day after the Hire is fulfilled.*

Step A: IF the JED changes are being entered on the same transaction as an FTE change on the position, click the plus sign to add a new **Action** sequence on the **Job Data** tab. If this transaction is being applied separately, enter the **Effective Date** of the JED change on the **Job Data** tab.

Step B: Enter **JED** for the **Action** and **Action Reason Code** to open the **Earnings Distribution** fields for editing. Scroll to the bottom of the **Job Data** tab to continue.

The screenshot shows the UCPath Job Data tab for an employee. The interface includes tabs for Position Data, Job Data, and Additional Pay Data. The Job Data tab is active, showing fields for Effective Date (07/01/2019), Effective Sequence (3), and Action Reason (JED). A table of Job Data entries is visible, with the first entry having an Action Reason of JED. Two callouts provide instructions: Step A points to the '+ -' button in the Job Data table, and Step B points to the 'Action Reason' field.

Step A: Click the **Add New Row** button to add additional **Job Data** updates with the same **Effective Date** as a **Position** change.

Step B: Select **JED** in both the **Action** and **Action Reason** field.

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Step C: In the **Earnings Distribution Type** field select **By Percent**. This will open the **Earnings Distribution** fields.

Step D: In the **Earnings Code** field, select **Additional Comp-Research (ACR)**.

Step E: Enter **100.00** in the **Distribution %** field. This will calculate the monthly **Comp Rate** to be paid under the ACR Earnings Code. If more than one Earn Code applies, the total of all lines must = 100%.

Step F: Enter **Job Data Comments** directed to the Academic Personnel UCPath Team. Example: Summer compensation for the month(s) of [month(s)] at [FTE value].

The screenshot shows the UCPath interface for setting up compensation. Key elements include:

- Step C:** A callout points to the "Earnings Distribution Type" dropdown menu, which is set to "By Percent".
- Step D:** A callout points to the "Earnings Code" field in the "Earnings Distribution" table, which is set to "ACR".
- Step E:** A callout points to the "Distribution %" field in the "Earnings Distribution" table, which is set to "100.00".
- Step F:** A callout points to the "Job Data Comments" text area.
- Note:** A red-bordered box contains the text: "Note: This amount will be charged to the designated ACR funding line." with an arrow pointing to the "Comp Rate" field in the "Earnings Distribution" table.

Pay Components		Earnings Distribution	
Rate Code	Comp Rate	*Earnings Code	Comp Rate
1 UCABVE	235,900.000000	1 ACR	13,794.907778
			Distribution %: 100.000

Step G: Navigate to the **Additional Pay** tab and **Submit** the transaction for approval.