

Maintaining Location & Cubicle in UCPATH

In order to ensure compliance with AB 119 Union reporting requirements and to maintain accurate and up-to-date information on **Position** and employee **Job** records in a timely manner, Departments are responsible for managing these data points via the **New Appointment** and **Updating Appointment Work Location** processes:

New Appointments:

Position Data: Location and Reports To Position Number

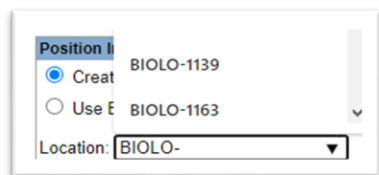
The **Location Code** and **Reports To Position Number** fields have been added to the *AP Folio New Appointment* forms (both the online parcels and pdf generating). Departments are responsible for providing both data points for all new appointments. The AP-Path team will update the **Position** with these data attributes prior to departments submitting a *Hire* template.

- The **Reports To Position Number** field is an open text field; enter the 8-digit position number of the supervisor.



Reports To Position Number: 40033044

- The **Location** field is a drop-down list that will auto-fill as you begin to type; select the code for the building & room number of the employees work location.



Position I
• Create BIOLO-1139
• Use E BIOLO-1163
Location: BIOLO-

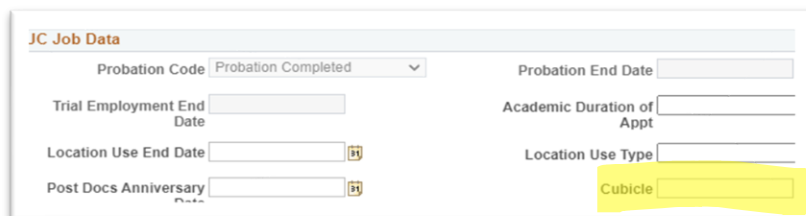
Note – if a new Location Code needs to be added to UCPATH:

- follow the [AB-119 Work Location Update Guide](#) (UCSB UCPATH website);
- select a default location/building code on the New Appointment form;
- once the new Location Code appears in UCPATH, follow the **Updating Work Location** instructions, below.

For fully remote employees, select the REMOTE Location Code¹. Note – for Contingent Workers, the Location field is on the Smart HR Template.

Job Data: Cubicle

The **Cubicle** field is part of the incumbents **Job Data** and is entered by the department on the **Hire Template** under the **UC Job Data** section at the time of hire.



UC Job Data
Probation Code: Probation Completed
Probation End Date: _____
Trial Employment End Date: _____
Academic Duration of Appt: _____
Location Use End Date: _____
Location Use Type: _____
Post Docs Anniversary: _____
Cubicle: _____

Cubicle Field Guidance:

- Data in the **Cubicle** field should reflect any additional office or cubicle detail that is not included in the **Location Code**:
 - Example 1: Cheadle Hall Office 1311 has offices A through G within the space:
 - **Position Location Code** = CHEAD-1311
 - **Job Data Cubicle** = Office-A
 - Example 2: The **Location Code** with the specific room number does not exist in UCPATH:
 - **Position Location Code** = CHEAD-552
 - **Job Data Cubicle** = Room-1311
 - If the Location Code provides full detail of the physical work location, this data point should also appear in the Cubicle field:
 - **Position Location Code** = CHEAD-1311
 - **Job Data Cubicle** = Cheadle-1311
- Formatting (15-character limit):
 - If Office detail is being added – enter as **Office-X**
 - If Cubicle detail is required – enter as **Cubicle-X**
 - If Room and Office/Cubicle are required – enter as **1311-Office-X** (adjust as needed based on 15-character limit)
- Hybrid work arrangements (an employee working on campus and home) are identified in the Cubicle field:
 - If there is no additional **Location** detail required – enter as **Hybrid**
 - If office/cubicle detail is required – enter as **H-Office-X** or **H-1311-Office-X**

¹ Remote work requires AP review; consult with the AP Policy Analyst prior to initiating a remote work agreement.

Updating Appointment Work Location: Location, Cubicle & Reports To

In order to ensure updates to the **Location**, **Cubicle** and **Reports To** fields are input into UCPATH as close to the date of the change as possible, departments are able to initiate **PayPath** transactions to update these three fields. These transactions will route to the central AP-Path team for approval. Please follow the guidance below.

Due Diligence:

- **Location/Reports To** fields are on the **Position**; changes to these fields will “take the date.” Review any upcoming changes and do not use a date that may be needed for upcoming **Position** changes:
 - FTE (increase or reduction)
 - Postdoc Level Progression
 - Promotion
 - FLSA Status
- Future dated rows that already exist in **Job Data**:
 - “Inserting” data (*information already exists in the system and a **PayPath** action is initiated with an effective date **prior to** the existing data date*) often creates inadvertent **Job Data** issues that lead to employee pay and benefit impacts; fixing these data and corresponding pay/benefit issues often requires a **Case** with **UCPC** and can be very time and labor intensive.
 - Prior to initiating a **PayPath** action, review **Job Data** for future **Effective Dates** or records with **Future** listed. Review **Current & Future** rows if multiple pages appear (**1 of 2**) on the record.

Work Location ? Find First 1 of 2 Last
Go To Row

Effective Date 03/01/2022
Effective Sequence 0
HR Status Active
Payroll Status Active
Action Position Change
Reason Temporary Reduction in Time
Job Indicator Primary Job
Future

Submitting the PayPath transaction:

1. Identify the best effective date that does not impact upcoming data changes or future attributes in **Job Data**.
 - If a future dated row exists, submit a **UCPath Certification** in [AP Folio](#) to request the data change; AP-Path will identify the actions needed to complete the change to mitigate potential pay/benefit impacts.
2. Initiate a **PayPath** transaction:
Note: If the **Current Effective Date** showing under *Existing Values* on the **Position** tab in **PayPath** is beyond the effective date of your action – **STOP** – a future dated row exists in **Job Data** – use the [UCPath Certification](#) form.

New Values to update Existing Values

Business Unit: SBCMP UC Santa Barbara Campus
Business Unit: SBCMP UC Santa Barbara Campus
Current Effective Date: 03/01/2022

3. Use the **Action/Reason** that aligns with your change:
 - **Location:** **POS/MCD** (Position tab)
 - **Reports To:** **POS/RTC** (Position tab)
 - **Cubicle:** **DTA/CRS** (Job Data tab)

*Note – The Action/Reason codes must be ADDED (+) to the **Job Data** tab when entering **Location** AND **Cubicle** data on one transaction or the data entered in the **Cubicle** field will not save correctly in the **Job Data** component.*
4. **Location** or **Reports To** changes are input on the **Position** tab by entering the data point directly, or selecting the magnifying glass icon to choose from a pre-designated list:

Location: SOUTH-1701 South Hall
Reports To Position: 40033943 DEPARTMENT CHAIR

5. **Cubicle** field changes are input on the **Job Data** tab by entering text (15-character limit):

Cubicle Cubicle-AF

Denied Transactions:

The AP-Path team will deny transactions for the following reasons:

- Transactions that change other attributes beyond **Location, Cubicle** and **Reports To**. All other appointment changes are still managed centrally by the AP-Path team via the Appointment processes.
- Transactions that use a **Position** date needed for a known upcoming change (e.g. 7/1 merit & promotion case).
- When future dated rows exist in **Job Data**. (Use the [UCPath Certification and Input](#) form. The AP-Path team will process these changes to mitigate impacts.)
- When the Action/Reason is not added to the **Job Data** tab for actions that update both **Location & Cubicle** fields.

Other Information:

- Departments are responsible for ensuring the **Location** and **Cubicle** information is updated when an employee's physical work location changes. Note that AB 119 requires work location information to be up-to-date on union reports for represented employees.
- Departments can use the **Cognos R-272 Employee Rosters Report** to review existing **Location** and **Cubicle** data.
- If a **Location Code** needs to be added to the UCPath Location Table, or if the default location for a Department Code should be changed, refer to the online instructions in the **Location Code Requests** section of the [UCSB UCPath website](#).

Managing Location and Cubicle information for Non-Represented Academic Employees:

AB 119 requires that employee work location be accurate and reportable for all represented employees; while it is not currently a requirement, it is recommended that non-represented employee information also be accurately maintained. Departments can update these records individually via **PayPath**, following the guidance as provided above.