AB 119 Work Location: Process Change for Academic Employees

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, the Academic Personnel Office is implementing the following changes to the New Appointment and Updating Appointment Work Location processes:

New Appointment Process:
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.

- 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.

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.

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.

Cubicle Field Guidance:
• Data in the Cubicle field is only required if the incumbents physical work location requires additional office or cubicle detail that is not included in the Location Code. (Examples below)
  o Example 1: Cheadle Hall Office 1311 has offices A through G within the space:
    ▪ Location Code Cheadle-1311 is entered on the Position
    ▪ Office-A is added to the Cubicle field to identify the specific work location
  o Example 2: The Location Code with the specific room number does not exist in UCPath:
    ▪ The generic Location/Building Code is entered on the Position
    ▪ Room-1311 is entered in the Cubicle field

• Formatting (15-character limit):
  o If Office detail is being added – enter as Office-X
  o If Cubicle detail is required – enter as Cubicle-X
  o 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:
  o If there is no additional Location detail required – enter as Hybrid
  o 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 now 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.

**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 avoid 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**.

3. Use the **Action/Reason** that aligns with your change:
   - **Location**: **POS/MCD** (Position tab)
   - **Reports To**: **POS/RTC** (Position tab)
   - **Cubicle**: **DTA/COR** (Job Data tab)
   - Note – The Action/Reason codes must be ADDED (+) to the **Job Data** tab when entering **Cubicle** AND **Location** 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:

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

For departments with **more than 10 employee records** that require an update, a mass upload may be requested. Submit an Excel spreadsheet that meets the below requirements to **ap-path@ucsb.edu** (subject: Mass Upload Request).
- Includes:
  - Employee ID #
  - Employee Record #
  - Position #
  - Location Code *(only if this attribute is changing)*
  - Cubicle *(only if detail beyond what is included in the Location Code is required)*
- Data Attributes:
  - Employee ID & Position # \(\rightarrow\) 8-digit number
  - Employee Record # \(\rightarrow\) 1- or 2-digit number
  - Location Code must be an EXACT MATCH to how it appears in UCPath
    - Example: **CHEAD-1311** for Cheadle, Room 1311
  - Cubicle must follow formatting guidance above, and cannot exceed 15 characters.
  - Note: Data Warehouse reports generate extra spaces in certain fields during the download process. Departments are responsible for removing extra spaces from any fields in their submissions to AP-Path. Failure to do so will result in a failed upload into UCPath.
- Exclude Employees with Future Dated Rows:
  - Employees with future dated data in UCPath **must be excluded from mass uploads**; these must be submitted separately via the **UCPath Certification** process in **AP Folio** for special handling.
  - If these are on the Mass Upload file, the system **will accept the change** via the upload process, but this **may cause other unintended data issues**. Departments are responsible for reviewing all data rows, identifying any data issues, and notifying **ap-path@ucsb.edu** of any corrections that may be needed.

Following the Mass Upload, any resulting warning or error messages will be provided to the department to review and manage any needed corrections (via **PayPath** to correct **Cubicle/Location** attributes, or email to notice the AP-Path team of other data issues).