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.
- 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. 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.

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:
    - Location Code = CHEAD-1311
  - Example 2: The Location Code with the specific room number does not exist in UCPATH:
    - Location Code = CHEAD-552
  - If the Location Code provides full detail of the physical work location, this data point should also appear in the Cubicle field:
    - Location Code = CHEAD-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

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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.

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