UCPath Non-Student Academic processing

September 17, 2018
Agenda

• Where we are right now
• Initiation of actions; who does what
  • Processes for communication with AP
• Appointments and hiring
• End date monitoring
• Timing and deadlines
• Post conversion tasks
• Support and Resources
• Q & A
Where we are right now

• MO conversion is complete; BW in process
  • Most non-student conversion fairly clean
  • Summer comp appointments auto-ended

• Mass-hire process underway
  • Submit via Google form
  • New hires only

• Departmental access as of September 27
  • Production
  • Post Conversion validation
Initiation of transactions: who does what

- **Department initiates:**
  - Hiring (includes hire, rehire, concurrent hire)
  - Voluntary termination (early end of appointment)
  - Funding

- **AP initiates:**
  - Modifications (e.g. change in % time, paid to WOS, reappointment)
  - Involuntary terminations
  - Stipends
  - Leaves
  - One-time additional pay
  - Short Work Break (SWB)
Processes for communication with AP

- Position creation via appointment request
- Via approval of reappointment, modification, merit in AP Folio or paper process
- New request for processing via AP Folio
  - SWB, one-time pay
- Leave processing to move on line soon
  - FMLA paperwork handle by AP rather than department
Appointments and Hiring

- Updated appointment forms and DMI screens to include position info
- Faculty with appointments in multiple departments have multiple positions/jobs
- On-boarding process/prehires
- Concurrent hires
  - Always check Person Org Summary or Workforce Job Summary to see if the potential employee is already in the system
  - Coordination
  - FLSA conflicts or pay cycle conflicts; consult with AP/HR
End date monitoring

• When to use auto term check box
  • When you reasonably expect the job to end; little chance of extension.
  • Expiration of appointment is considered “involuntary” termination

• Expected end date does not stop pay or end job unless “auto term box” is checked. Options:
  • SWB- mainly for Lecturers working intermittently (9/9)
    • Extend expected end date and place on SWB
  • Extend end date if job will continue (contingent on appropriate approvals)
  • Term job if ending; AP to term, dept does final pay if needed
<table>
<thead>
<tr>
<th>Pay Cycle</th>
<th>Check Date</th>
<th>Pay Period Dates</th>
<th>Run ID Schedule</th>
<th>Location</th>
<th>Location</th>
<th>Location</th>
<th>UCPay Confirmation</th>
<th>GL Post Confirmation</th>
<th>Pay Support Confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>MO</td>
<td>Mon 10-18</td>
<td>09-18-18</td>
<td>09-30-18</td>
<td>180930M0X</td>
<td>Wed 09-19</td>
<td>Wed 09-19</td>
<td>Fri 09-21-18</td>
<td>Sat 09-22-18</td>
<td>Mon 10-22-18</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 10-03</td>
<td>09-09-18</td>
<td>09-22-18</td>
<td>180922B1X</td>
<td>Tue 09-25</td>
<td>Wed 09-26</td>
<td>Thu 09-27-18</td>
<td>Sat 09-29-18</td>
<td>Mon 10-29-18</td>
</tr>
<tr>
<td>MO</td>
<td>Thu 11-01</td>
<td>10-01-18</td>
<td>10-31-18</td>
<td>181031M0X</td>
<td>Mon 10-22</td>
<td>Fri 10-19</td>
<td>Wed 10-24-18</td>
<td>Fri 10-26-18</td>
<td>Mon 10-29-18</td>
</tr>
<tr>
<td>MO</td>
<td>Wed 01-02</td>
<td>12-01-18</td>
<td>12-31-18</td>
<td>181231M0X</td>
<td>Tue 12-18</td>
<td>Mon 12-17</td>
<td>Thu 12-20-18</td>
<td>Thu 12-27-18</td>
<td>Thu 12-27-18</td>
</tr>
<tr>
<td>B1</td>
<td>Wed 01-09</td>
<td>12-16-18</td>
<td>12-29-18</td>
<td>181229B1X</td>
<td>Fri 12-28</td>
<td>Thu 01-03</td>
<td>Thu 01-03-19</td>
<td>Fri 01-04-19</td>
<td>Fri 01-04-19</td>
</tr>
<tr>
<td>B2</td>
<td>Wed 01-12</td>
<td>12-30-18</td>
<td>01-13-10</td>
<td>100113B2X</td>
<td>Fri 01-11</td>
<td>Tue 01-15</td>
<td>Wed 01-15-10</td>
<td>Thu 01-15-10</td>
<td>Thu 01-15-10</td>
</tr>
</tbody>
</table>
Post conversion tasks: Sept. 27 and later

- Review future dated appointments or other changes
- Monitor end dates in October and take appropriate action
- Use data warehouse reports with PPS data to assist
Upcoming and ongoing support

- Drop in labs beginning 9/27
- AP web site
- UCPath help
- Training in late winter/early spring regarding summer issues:
  - summer research compensation
  - summer session teaching
  - SWB for lecturers
- New employee training in development
Academic Personnel
UCPath contacts

Karen Moreno  x 5429  karen.moreno@ucsb.edu
UC Path Manager

Danica Acosta  x 5963  ddacosta@ucsb.edu
UC Path Analyst

Monique Chaidez  x 5977  monique.chaidez@ucsb.edu
UC Path Analyst

Academic Personnel web site  https://ap.ucsb.edu/
Questions?