Approving PayPath Transactions

In UCPath

WFA Approvers play a critical role in UCPath:

➢Validate transaction data matches approvals

➢Catch errors prior to data writing to the system

➢Avoid negative impacts to employee pay & benefits due to data issues

➢Ensure timely processing of transactions (catching errors within transactions can eliminate lengthy delays related to corrective action)

➢Reduce the number of Cases to UCPC to process corrections

➢Lower the number of campus and UCPC touch points needed with corrective action

➢Provide training/support to Initiators – learning opportunities

UCPath Worklist

Transactions pending approval will appear in the UCPath Worklist of all authorized approvers.

Transactions pending approval can be accessed directly on the UCPath Dashboard, or by selecting the Worklist option from the left menu.

The Worklist can also be accessed via the PeopleSoft Homepage > Workforce Administration page under the Approvals tile.
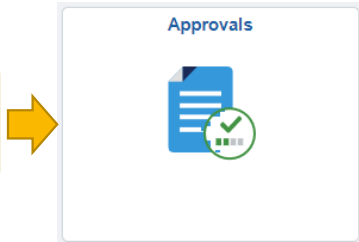
UCPath Worklist

Transaction Link text includes:
- Action *(paypath)*
- Transaction # *(T001152166)*
- Employee ID – *if existing*
- Employee Record *(0)*

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
Irene Initiator	12/14/2022	Approval Routing	Approval Workflow	Select an Opt ⌄	UC_SBCMP_paypath_acad, 1215897, UC_SBCMP_paypath_acad_dept, 2016-02-01, N, 0, UC_TRANSACT_ID:P001217113 EMPLID:10040227 EMPL_RCD:0 RDC:RA,0,A,

Note: Departments only approve PayPath transactions for Academic Student Employees.

Academic Non-Student Transactions route to AP for approval. Departments are only permitted to submit Location, Cubicle and Reports To changes via PayPath for academic non-students.

Select the blue Transaction link from within the **Worklist** to open the transaction detail.

PayPath - Position

The Position Change Reason selected aligns with the primary change on the position.

Only ONE Reason can be entered on Position Changes – this should reflect the primary change when more than one change is being input in the transaction

Data attributes on multi-headcount positions will be greyed out. Updates cannot be processed in PayPath.

Position updates to ASE multi-headcount positions should be requested via the AP Folio UCPath Certification and Input form.

Verify the Empl Record is correct

If there is no Action/Position Change Reason, no changes were input on the Position tab.

Effective Date is correct

Data Changes (highlighted in blue) align with approved appointment changes.

Current Effective Date should precede the Effective Date on the transaction

| Position Data | Job Data | Additional Pay Data |

Emily Employee   Employee   Empl ID 12345678   Empl Record 1

Position Data

Position Data

Position Number: 40034412   RES-FY-NON REP
Effective Date: 05/01/2023

Action: POS   Position Change
Position Change Reason: TRT   Temporary Reduction in Time

New Values to update

Business Unit:	SBCMP	UC Santa Barbara Campus
Department ID:	ERTH	EARTH RESEARCH INSTITUTE
Location:	ELLIS-6829	Ellison Hall
Job Code:	003207	RES-FY-NON REP
Union Code:	99	Non-Represented
FLSA Status:	Exempt	
Reports To Position:	40030860	DIRECTOR
Sal Admin Plan:	T13A	
Salary Grade:	1	
Standard Hours:	10.00	
FTE:	0.250000	

Existing Values

Current Effective Date: 12/02/2022

Business Unit:	SBCMP	UC Santa Barbara Ca...
Department:	ERTH	EARTH RESEARCH INSTITUTE
Location:	ELLIS-6829	Ellison Hall
Job Code:	003207	RES-FY-NON REP
Union Code:	99	Non-Represented
FLSA Status:	Exempt	
Reports To Position:	40030860	DIRECTOR
Sal Admin Plan:	T13A	
Salary Grade:	1	
Standard Hours:	12.00	
FTE:	0.300000	

Mail Drop:
Position Pool:
Employee Relations Code: Supervisor, Not Confidential
Classified Indicator: Academic

Adds to FTE Actual Count: ☑
Include FTE: ☑
Representation Code: Uncovered   Worksite ID 95

Secondary Organization
| Department | Description |
| 1 | |

Return to Search

Position Data | Job Data | Additional Pay Data

Once all Position data changes are validated, navigate to the Job Data tab.

PayPath – Job Data

Review each change (blue highlight) to ensure it aligns with an Action/Reason and corresponds with the expected appointment change.

If there is more than one change/Action-Reason Combo, use the "<" and ">" arrows to view each Effective Sequence*.

Effective Date is correct

Action & Action Reason should align with each change

Data changes carry forward from the Position and are highlighted in blue

*Job Data allows for there to be multiple changes with corresponding Reason Codes applied, these appear as an "Effective Sequence."

Carefully review pay attributes to ensure all are correct.

Be sure to validate UC Job Data elements – these can differ by population.

Relevant comments can be added to the Job Data Comments box.

Position Data | Job Data | Additional Pay Data

Emily Employee — Employee — Empl ID 12345678 — Empl Record 0

Funding Entry Page
Work Force Job Summary
Person Org Summary

Academic: Post Docs — HR Status: Active — Payroll Status: Active

Job Data — Find | View All — First 1 of 1 Last

Effective Date: 11/30/2022 — Action: POS — Position Change
Effective Sequence: 0 — Action Reason: COR — Position Data Correction

Current Effective Date: 08/02/2022 — Current Action: DTA — Data Change
Current Eff Sequence: 3 — Current Action Reason: BNE — Benefits: Update Eligibility

Position Number: 40818906 — POSTDOC-EMPLOYEE
Business Unit: SBCMP — UC Santa Barbara Campus
Department: ITPH — INSTITUTE OF THEOR PHYSICS
Location Code: KOHN-567 — Kohn Hall
Job Code: 003252 — POSTDOC-EMPLOYEE
Union Code: PX — Post Doctoral Scholars
Reports To Position Number: 40035284
FLSA Status: Exempt
Salary Administration Plan: T023 — Establishment ID: UCSB — UC Santa Barbara
Salary Grade: L1 — Step:
FTE: 1.000000 — Employee Class: 23 — Academic: Post Docs
Appointment End Date: 08/01/2023 — End Job Automatically: ☐

Earnings Distribution Type: None — Comp Rate: 5,661.000000 — Standard Hours: 40.00 — Pay Frequency: UC_FY — UC 12/12 - FY

Pay Components — Personalize | Find | | — First 1 of 1 Last

	Rate Code	Comp Rate	Compensation Frequency	
1	UCANNL	67,932.000000	Annual	

Earnings Distribution — Personalize | Find | | — First 1 of 1 Last

	Earnings Code	Comp Rate	Distribution %
1			

UC Job Data

Post Docs Anniversary Date: 08/02/2023 — Academic Duration of Appt: End Date (Academic Term Appts)
Location Use End Date: — Cubicle: KOHN-2403
Location Use Type:

Job Data Comments: Updated office #

PayPath:
Action Reason Codes

Action Reason's may differ for academic and staff transactions.

Position Action Reasons:

Only one Action Reason can be selected per transaction – apply the most relevant change reason.

Job Action/Action Reasons:

There are multiple action Types – Data Changes, Pay Changes, and Short Work Break Actions.

Multiple Action/Reasons can be added to one transaction – this creates an effective sequence of the changes.

POS	Position Action
COR	Position Data Correction
ERC	Update Employee Relations Code
FLS	FLSA Override Due to Review
JRD	Job Reclassification -Downward
JRL	Job Reclassification - Lateral
JRU	Job Reclassification - Upward
MCD	Update Mail/Location Code
PIT	Permanent IncreaseInTime(FTE)
PRO	Promotion
PRT	Permanent ReductionInTime(FTE)
RTC	Reports To Change
TIT	Temporary Increase in Time
TRT	Temporary Reduction in Time
XFR	Transfer

DTA	Job Data Action
CAR	Limited to Career
COR	Correction - Non Pay Related
CPR	Correction-Pay Rate
ERI	Update ERIT End Date
EXP	Extend Expected Return Date
EXT	Add/Extend Appointment
FRQ	Update Job Comp Frequency
PHR	Update Phased Retiremnt End Dt
PRB	Update Probation Code/End Date
TMF	Update Auto Termination Flag

PAY	Job Data Action
AMR	Academic Merit/Reappointment
ATB	Across-The-Board
DEM	Demotion
EQU	Equity
JRD	Job Reclass - Downward
JRL	Job Reclass - Lateral
JRU	Job Reclass - Upward
MER	Merit
MIN	Bring To Meet Minimum
PRO	Promotion/Academic Promotion
REF	Range Adjustment/Comp Refresh
STI	Step Increase/Progression

SWB	Job Data Action
GST	Academic Students
LMT	Limited Employees
P09	Partial Year Career - 9 Months
P10	Partial Year Career -10 Months
P11	Partial Year Career -11 Months
UST	Staff Students
RWB	**Job Data Action**
RWB	Return from Short Work Break

If the Action/Action Reason Code does not align with the changes being implemented, the transaction should be denied with instructions to the Initiator on corrections needed.

PayPath –
Additional Pay Data

Approve or Deny the transaction.

| Position Data | Job Data | **Additional Pay Data** |

Emily Employee   Employee   Empl ID   12345678   Empl Record   0

New Additional Pay   Find | View All   First ◀ 1 of 1 ▶ Last

No Data present for cu

*Earnings Code: SAS 🔍 Stipend-Admin-Staff   ➕ ➖

Effective Date   Find | View All   First ◀ 1 of 1 ▶ Last

*Effective Date: 12/01/2022 📅   ➕ ➖

▼ **Payment Details**   Find | View All   First ◀ 1 of 1 ▶ Last

Addl Seq #:   1   ➕ ➖

End Date: 06/30/2023 📅   Reason: New Additional Pay ⌄

Pay Period Amt: $500.00

Goal Amount: [   ]   Goal Balance:

☑ Prorate Additional Pay

Applies To Pay Periods
☑ First   ☐ Second   ☐ Third

Job Information

Employee Type: Salaried   Standard Hours: 40.00
Compensation Rate: $5,661.000000   Frequency:

Default Job Data

Position: 40818906   POSTDOC-EMPLOYEE
Business Unit: SBCMP   UC Santa Barbara Campus
Department: ITPH   INSTITUTE OF THEOR PHYSICS
Job Code: 003252   POSTDOC-EMPLOYEE
FTE: 1.000000
Employee Status: Active   Expected Job End Date: 08/01/2023

[Approve]   [Deny]   Upload \ View Supporting Docum

Transaction ID   P001202675
Workflow Status   Submitted
Request Status   Pending Approval
Initiator's Comments   Updated office #

> Academic Student Employees do not typically qualify for recurring additional pay. Please refer questions to the AP Policy Analyst that supports the ASE population.

> Once all data points are validated on all tabs where changes have been applied:
> - **Approve** if correct.
> - **Deny** if corrections are needed; *Notes in Approver Comments box are required for denials.*

Approving UCPath Actions

Key Takeaways

- Approvers play a critical role in ensuring data is correct before it writes to the system; they serve as the first line of defense in ensuring employee pay and benefits are correctly applied in the system.

- The Effective Date drives the transaction; the system defaults to the date of entry – it is critical to validate the date is correct.

- Action/Reason(s) have downstream impacts, ensure what is entered on the transaction aligns with the actions/changes being made to the appointment.

- Only one Reason can be applied to Position changes in PayPath, even if multiple changes are input in a transaction – make sure the Reason entered aligns with the most relevant reason for the changes.

- Job Data allows for multiple changes with a separate entry with the corresponding Reason Code; ensure that a Reason that aligns with each change is input as a separate sequence.

- Review all data points on the transaction – this is your opportunity to catch other potential issues on the employee record and make needed corrections.