UCI UCPath

Salary Cap/Multiple Components of Pay Worksheet

Ensure you have your phone or fob for the
Duo Mobile multi-factor authentication

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Introductions

Instructor

- Name
- UCI role
- UCPath role
- Functional experience

Course Agenda

Topic
1: Purpose of Salary Cap/MCOP Funding Worksheet
2: Salary Capped Funding
3: Health Sciences Salary Caps & Multiple Components of Pay

Course Objectives

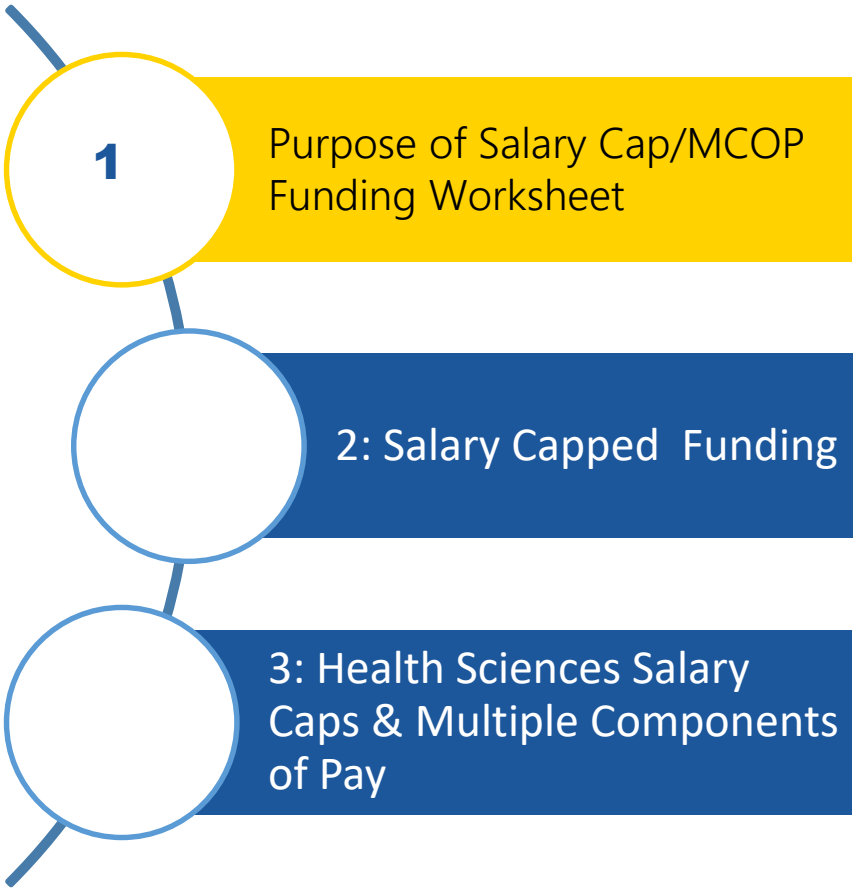
Key Objectives:

- Understand the Salary Cap/Multiple Components of Pay Worksheet
- Examine the difference between Salary Cap and MCOP NSTP worksheet
- Review Health Sciences Salary Caps & Multiple Components of Pay

LESSON 1

Purpose of Salary Cap / MCOP Funding Worksheet

Lesson Objectives



In this lesson, we will:

- Why is the Salary Cap/MCOP Funding Worksheet needed
- How to access the Salary Cap/MCOP Funding Worksheet

Funding Entry Overview

Whenever a department creates a new position, funding has to be added to establish the account/fund to be used for the payroll expenses.

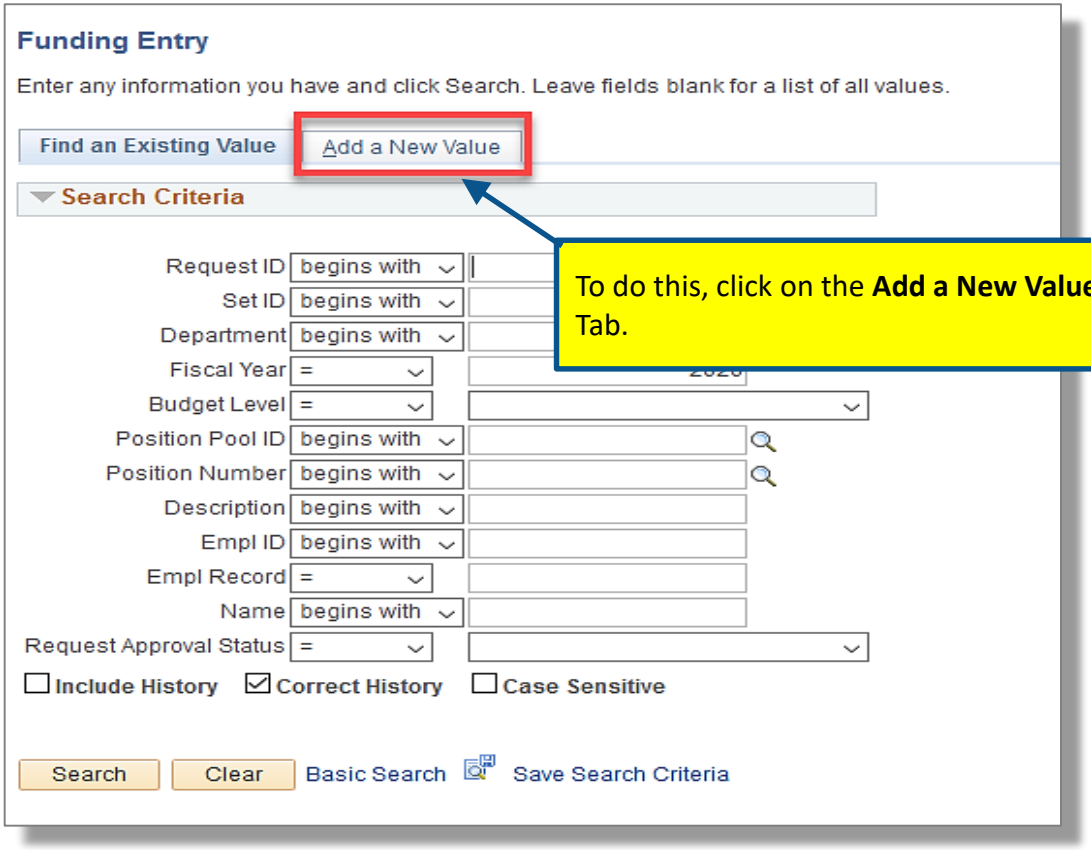
Many UCI employees are paid using funds the have salary caps (i.e., grant funds) and/or with multiple funding sources (i.e., NSTP or HCOMP).

The scenarios below trigger the use of the Salary Cap/MCOP Funding Worksheet.

- Entering an account/fund combination on the Funding Entry page that has a salary cap
- Entering multiple components of pay using multiple funding sources

Funding Entry - Accessing the Worksheet

Navigation: PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry



To access the MCOP worksheet, you must navigate to the funding entry page.

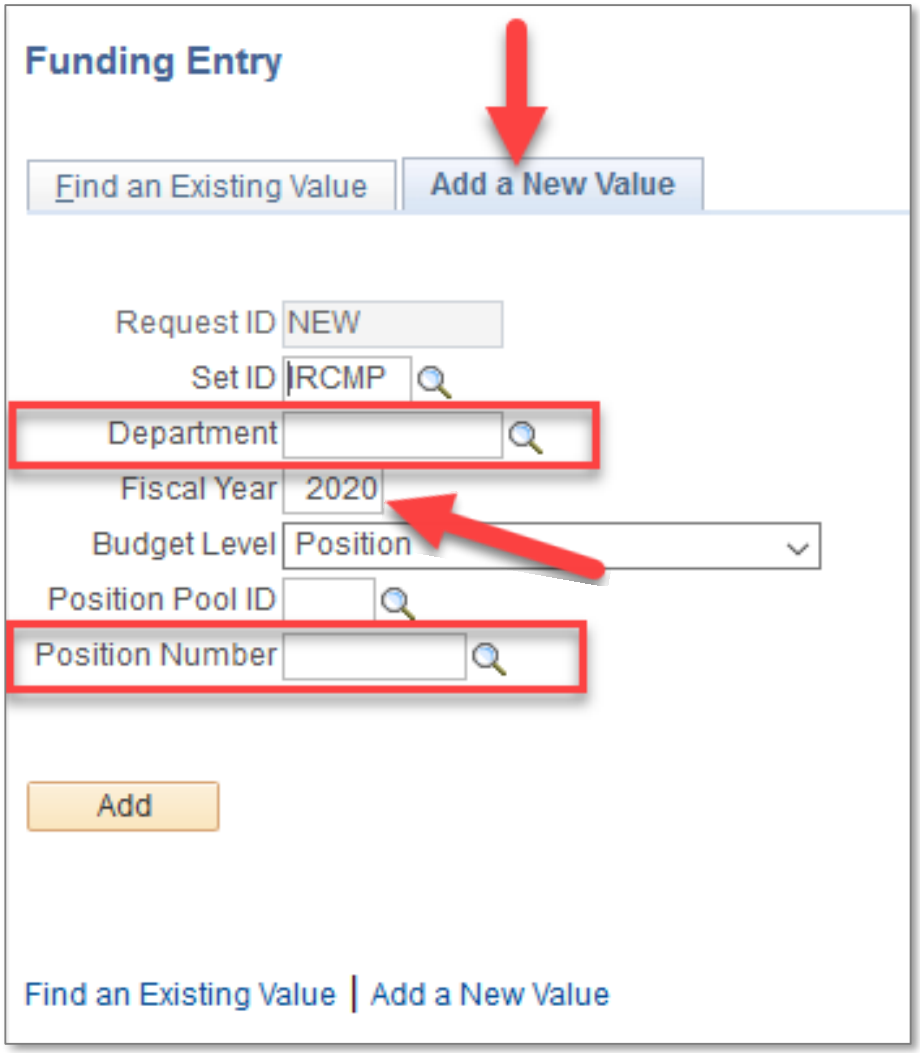
[Please refer to funding entry training for additional information establishing position funding.]

Funding Entry - Add a New Value tab

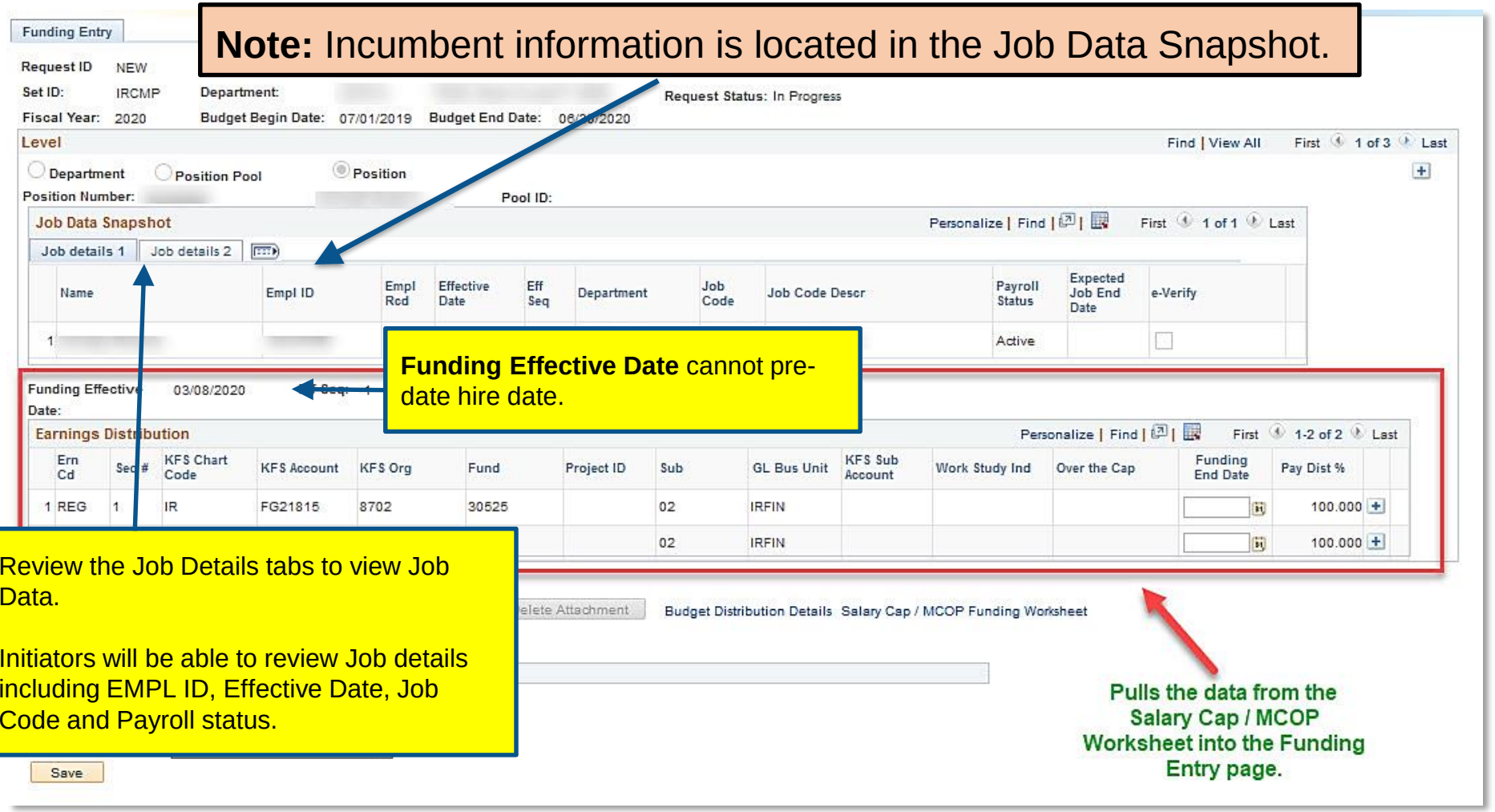
To enter new funding, update existing funding, or view existing funding information, enter the following on the Add a New Value tab:

- **Department** in which the position resides
- **Position Number**

Note: The **Fiscal Year** will default to the current period. If you wish to enter funding for a future period, this field must be updated here.



Funding Entry Data Elements



Note: Incumbent information is located in the Job Data Snapshot.

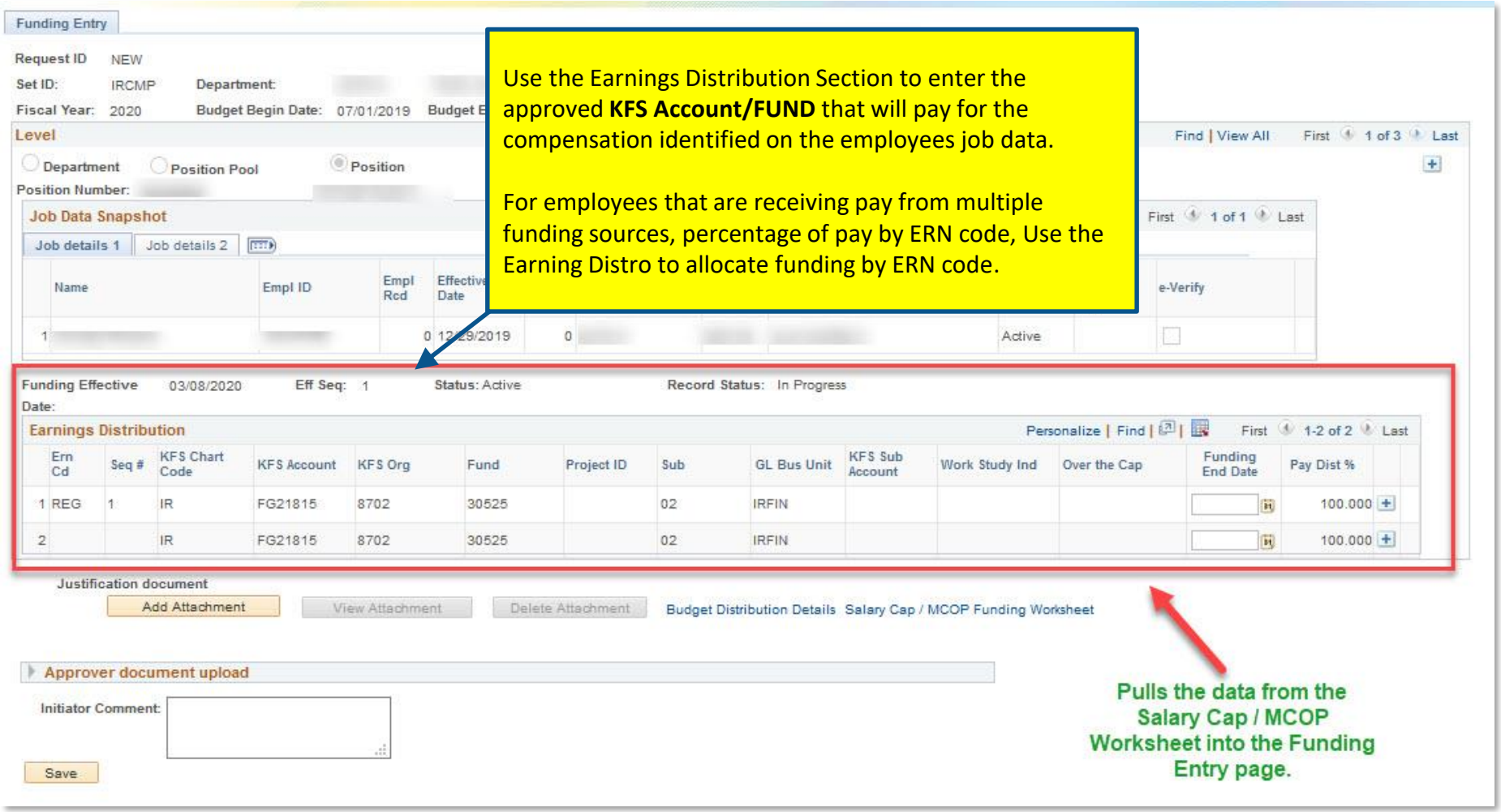
Funding Effective Date cannot pre-date hire date.

Review the Job Details tabs to view Job Data.

Initiators will be able to review Job details including EMPL ID, Effective Date, Job Code and Payroll status.

Pulls the data from the Salary Cap / MCOP Worksheet into the Funding Entry page.

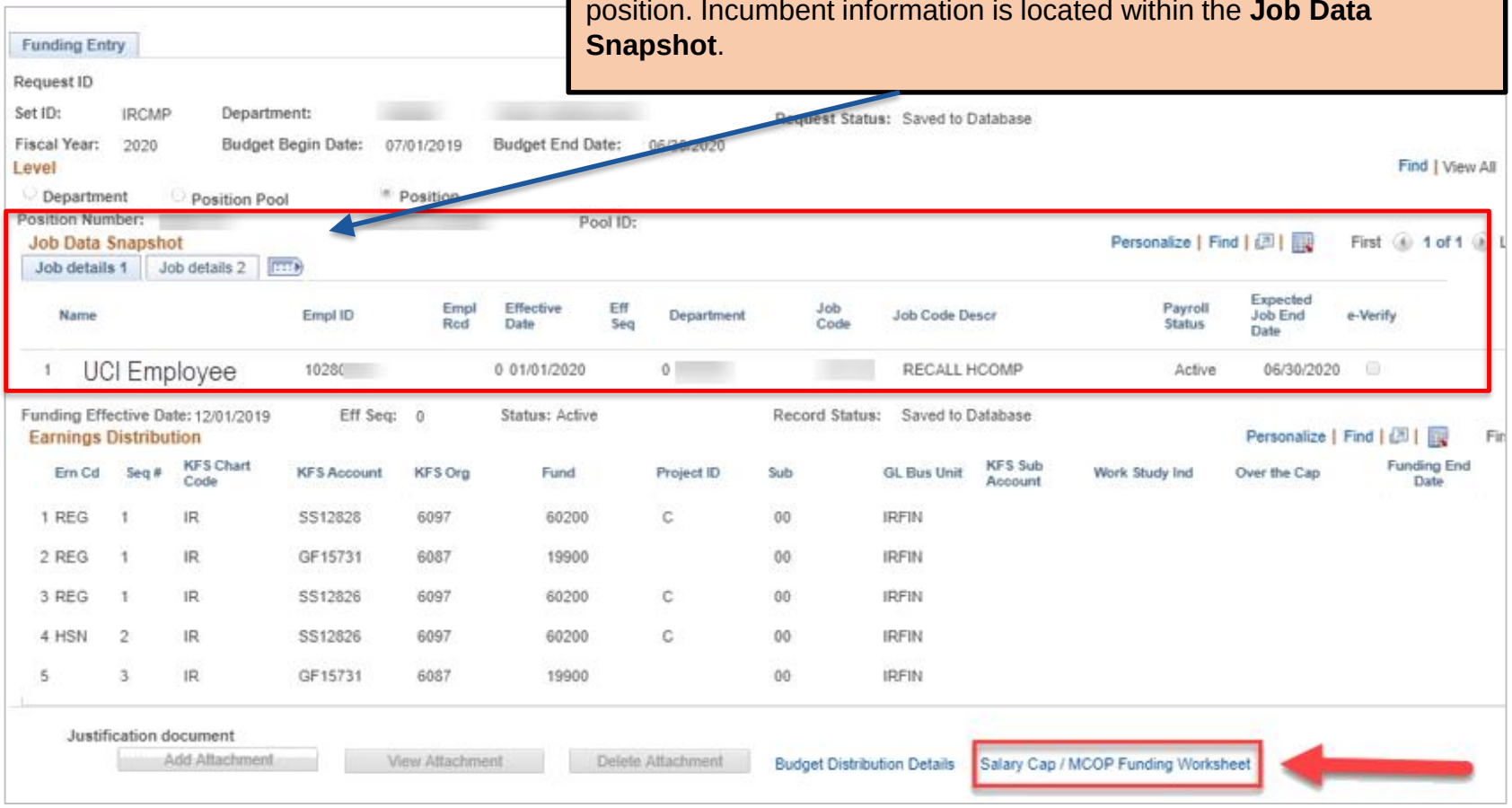
Funding Entry – Enter KFS Account



How to access the worksheet

The **Salary Cap/MCOP Funding Worksheet** link is located at the bottom of the Funding Entry page.

In order to access the worksheet, an incumbent must be hired into the position. Incumbent information is located within the **Job Data Snapshot**.



LESSON 2

Salary Capped Funding

Lesson Objectives

1: Purpose of Salary Cap/MCOP Funding Worksheet

2 Salary Capped Funding

3: Health Sciences Salary Caps & Multiple Components of Pay

In this lesson, we will:

- What are salary capped funds
- When do salary capped funds require the use of the worksheet
- How to setup the worksheet for salary capped funds

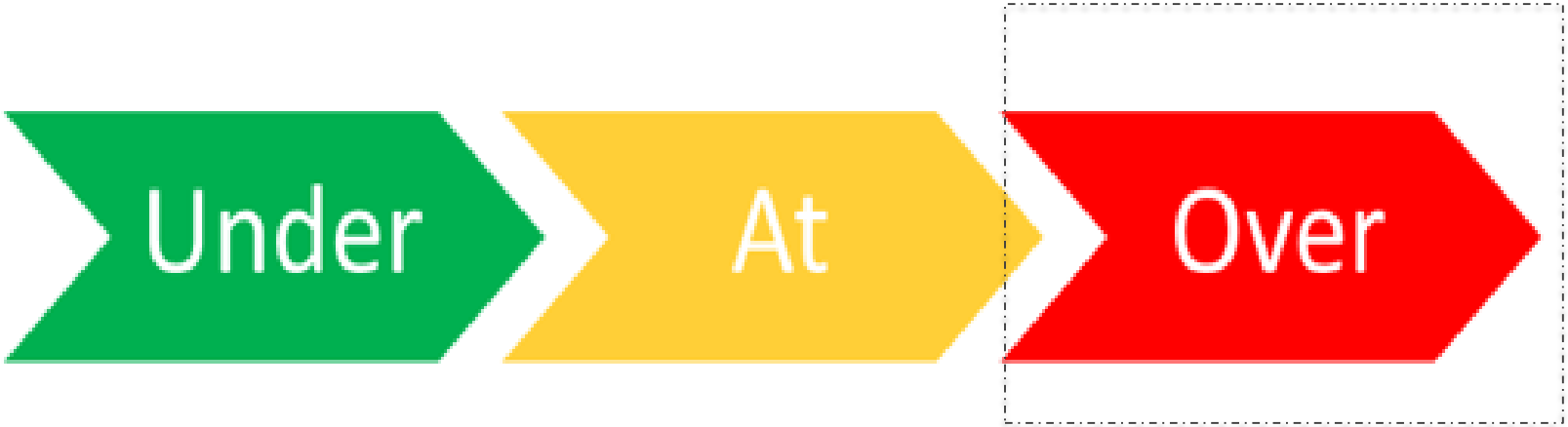
What is Salary Cap Funding

Many UCI employees are paid using funds the have salary caps.

- A custom effective-dated table that stores salary cap rates, fund and project attributes is available in UCPath.
  - The tables is effective-dated so that changes to salary cap rates over time can be tracked and applied.
  - The following types of funds are stored in this table: Federal, sponsored, state, general, restricted, sponsor name, award type, federal flow through, and other sponsor types.
  - Cap rates will be prorated based on Compensation Frequency of the employee (e.g. 9 over 12).

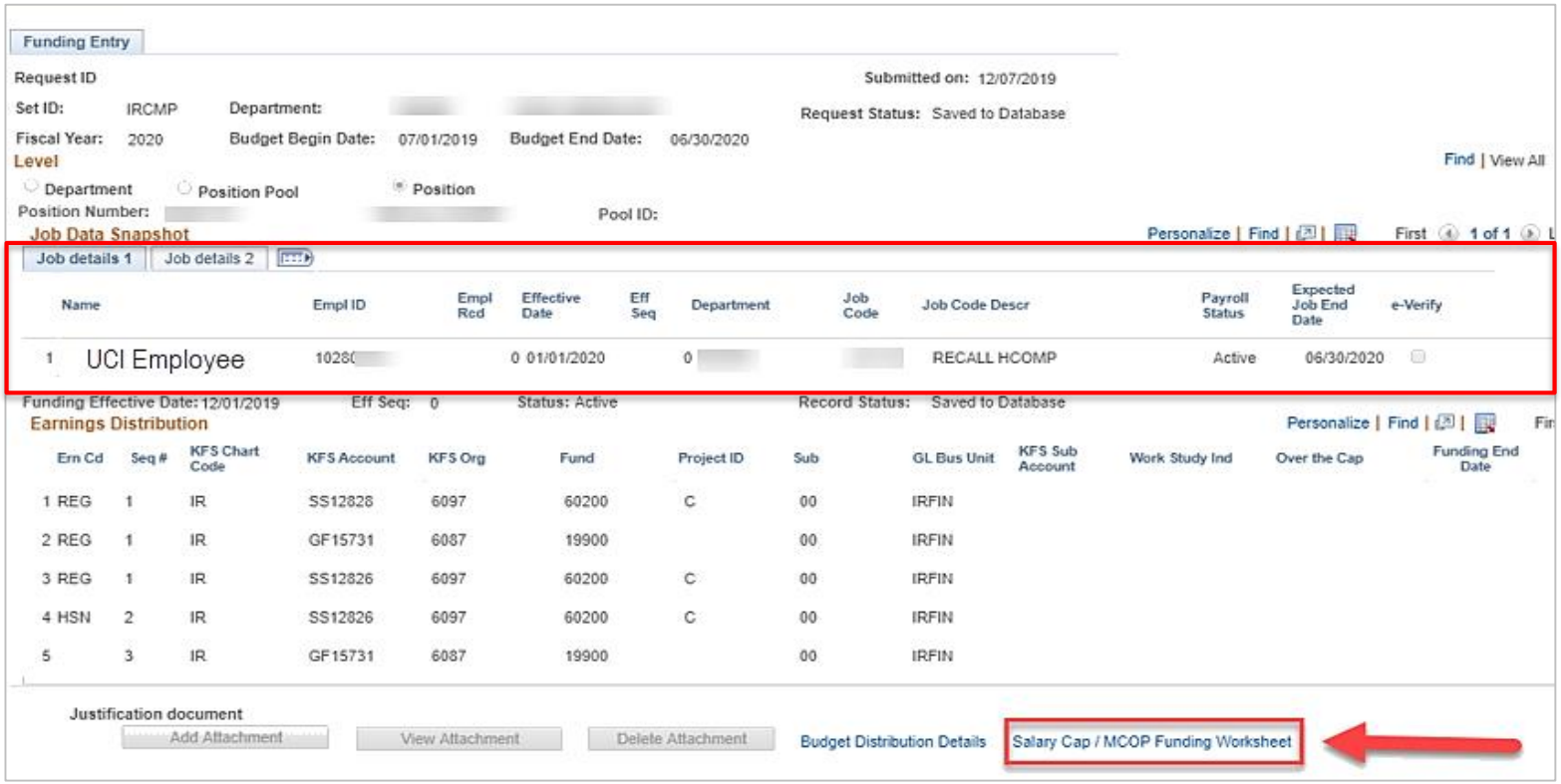
Salary Cap/MCOP Funding Worksheet

The Salary Cap/ MCOP Funding Worksheet is required when an employee is compensated with funds that have a salary cap and their compensation exceeds the amount allowed for the capped fund.

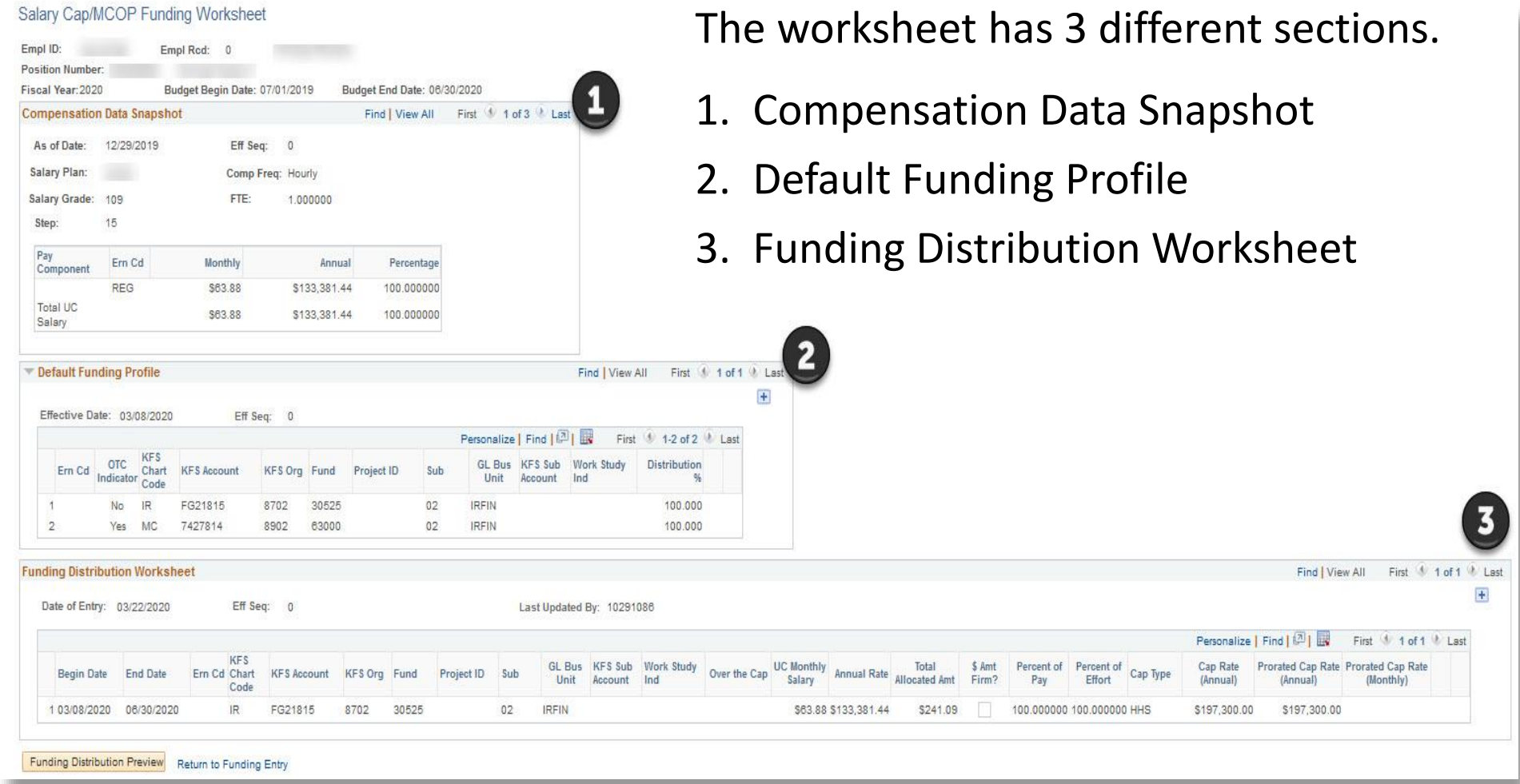


Salary Cap/MCOP Funding Worksheet

Select the Salary Cap/MCOP Funding Worksheet hyperlink on the bottom right of page to access the MCOP funding worksheet.



Components of the Worksheet



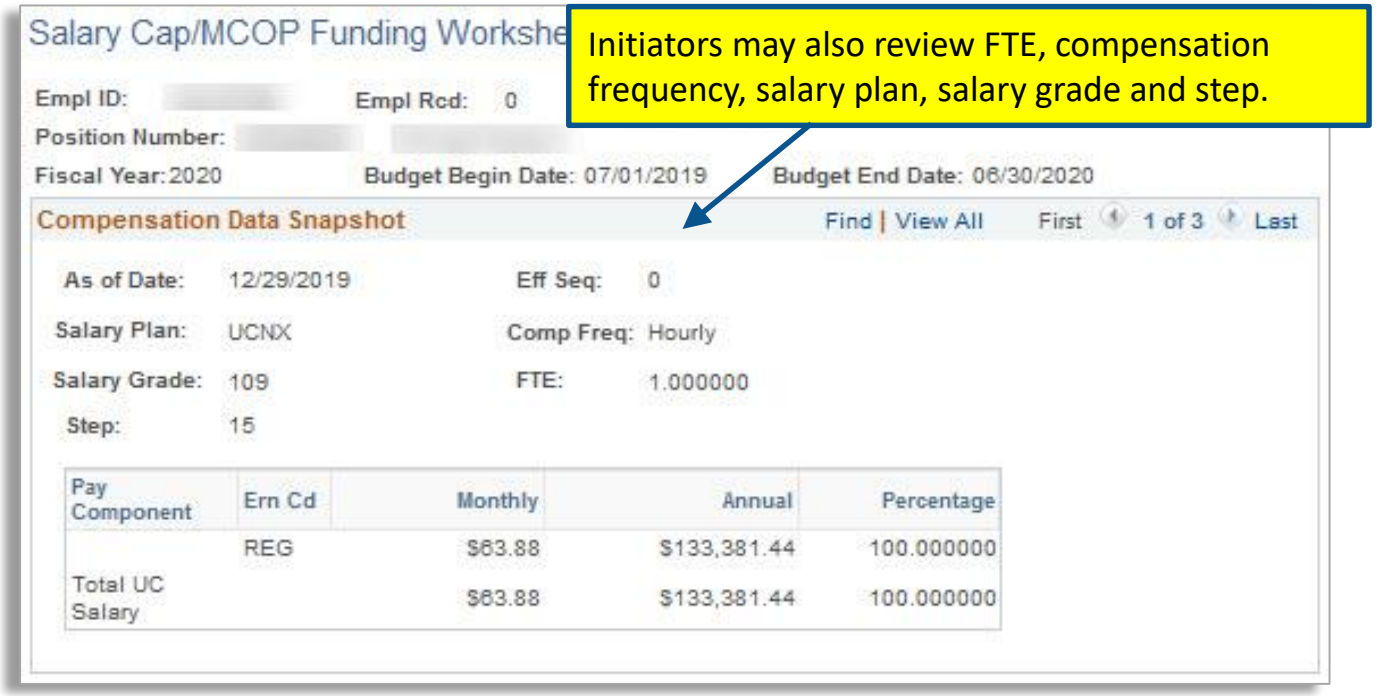
The worksheet has 3 different sections.

1. Compensation Data Snapshot
2. Default Funding Profile
3. Funding Distribution Worksheet

Compensation Data Snapshot

The **Compensation Data Snapshot** provides the employee's monthly and annual compensation amount by earn code and percentage.

When accessing the MCOP worksheet, the compensation details are displayed at the top of the page.



Default Funding Profile

- **Default Funding Profile** section is set up to ensure that payroll expenses are charged to the correct KFS account/fund. Initiators have to indicate which account and fund will pay up to the cap and which will pay over the cap.
- **Effective Date** – indicates when the use of this funding should begin.
    - These dates can be in the future, though it is recommended to not plan too far in the future should the funding need to change.

Default Funding Profile

Find | View All First 1 of 1 Last

Effective Date: 03/08/2020 Eff Seq: 0

Personalize | Find | First 1-2 of 2 Last

	Ern Cd	OTC Indicator	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	KFS Sub Account	Work Study Ind	Distribution %
1		No	IR	FG21815	8702	30525		02	IRFIN			100.000
2		Yes	MC	7427814	8902	63000		02	IRFIN			100.000

Default Funding - Salary Cap

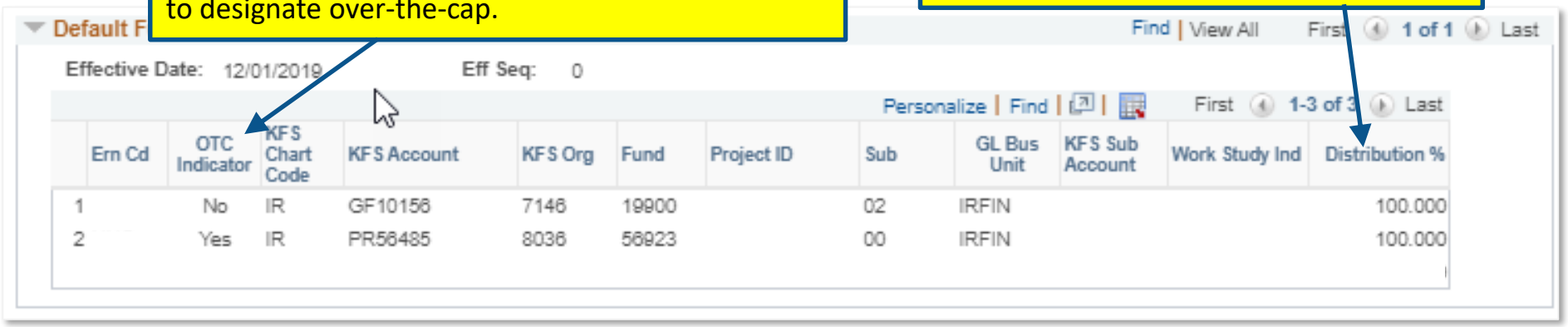
Scenario

Employee has a salary of $125,000. The KFS account used has a salary cap of $100,000.

The initiator will have to enter another account to cover the over the cap gap amount ($25,000).

Use the **OTC Indicator** to designate the Fund Source(s) that are to be charged when salary exceeds the Cap. There are no Earning Codes used to designate over-the-cap.

The **Distribution %** shows the percentage paid by earn code.



Funding Distribution Worksheet

The **Funding Distribution Worksheet** section allows the initiator to identify the desired funding sources for employee payroll expenses.

- The **Begin Dates** and **End Dates** are specified to inform UCPath when the KFS Account should begin and end paying from the distribution line.
  - **Begin Date** should match the Effective Date in the Default Funding Profile section.
  - **End Date** should not go past the fiscal year end date of 6/30/YYYY.
- The **Percent of Pay** and **Percent of Effort** fields must sum to 100% for each line entered.

Funding Distribution Worksheet

Find | View All First 1 of 1 Last

Date of Entry: 03/22/2020 Eff Seq: 0 Last Updated By: 10291086

Personalize | Find | First 1 of 1 Last

Begin Date	End Date	Ern Cd	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	KFS Sub Account	Work Study Ind	Over the Cap	UC Monthly Salary	Annual Rate	Total Allocated Amt	$ Amt Firm?	Percent of Pay	Percent of Effort	Cap Type	Cap Rate (Annual)	Prorated Cap Rate (Annual)	Prorated Cap Rate (Monthly)
1 03/08/2020	06/30/2020		IR	FG21815	8702	30525		02	IRFIN				$83.88	$133,381.44	$241.09		100.000000	100.000000	HHS	$197,300.00	$197,300.00	

Funding Distribution Preview Return to Funding Entry

Percentage of Effort

UC Monthly Salary	Annual Rate	Total Allocated Amt	$ Amt Firm?	Percent of Pay	Percent of Effort
$14,841.67	$178,100.00	$4,799.80	☐	10.780011	10.780011
$14,841.67	$178,100.00	$92,692.17	☐	89.220024	89.220024
$14,841.67	$178,100.00	$6,399.73	☐	10.780006	10.780006

Effort is the portion of time spent on a particular activity, expressed as a percentage of the individual's total activity for the institution. Total effort must equal 100%, no matter how many hours were worked.

Percent of effort isn't the same as distribution effort on the funding worksheet.

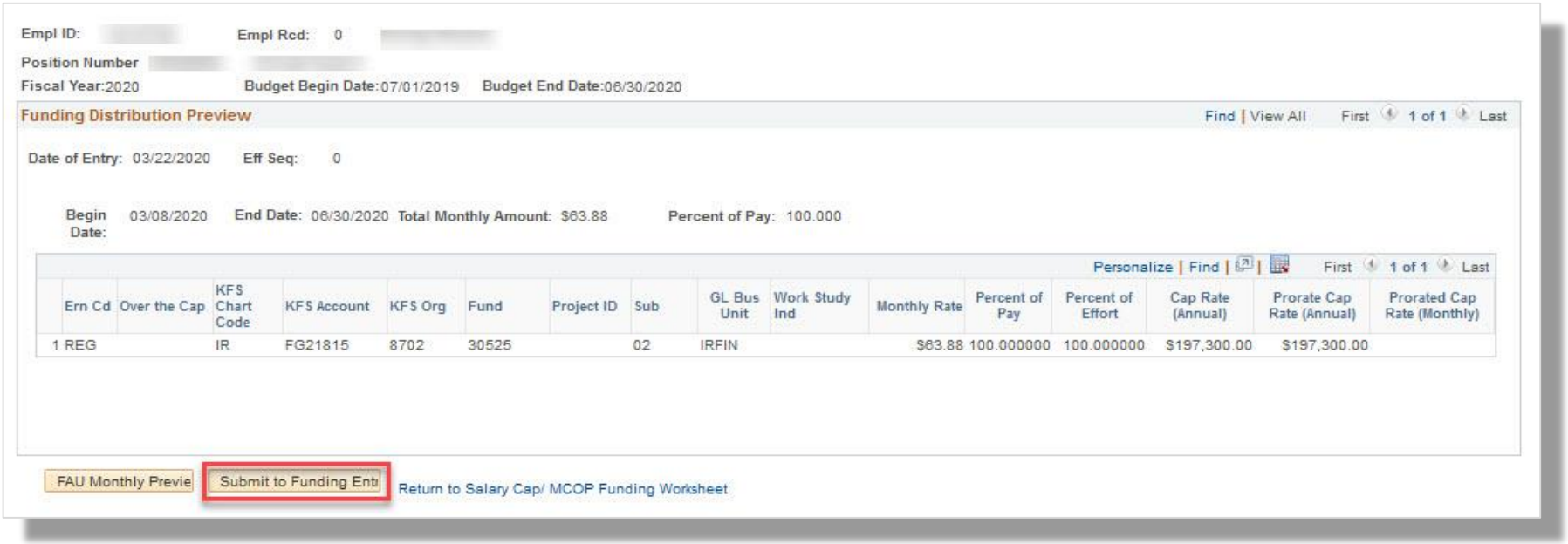
The funding worksheet percent of effort is derived from different logic than the funding entry page use by ERN code.

Funding Preview

After entering the account information within the Funding Distribution section, select the Funding Distribution preview button to review all fund all funding data on within the position record.

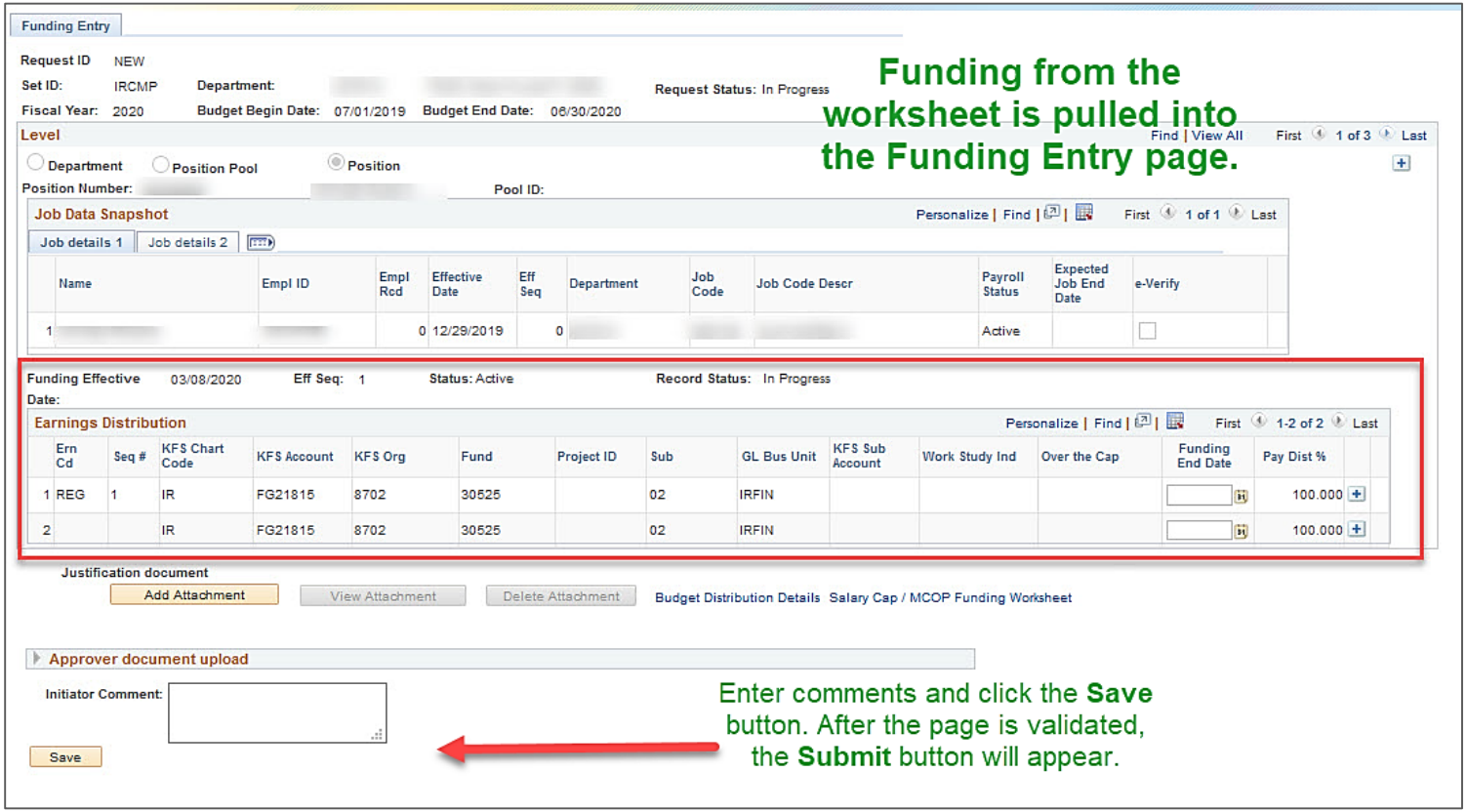
Funding Preview

- The **Funding Distribution Preview** page displays a preview of all funding distributions, to verify the data is accurate and complete, and includes the applied caps and over the cap amounts.
- If there are no errors, click the **Submit to Funding Entry** button to move the funding entered on the worksheet to the Funding Entry page.



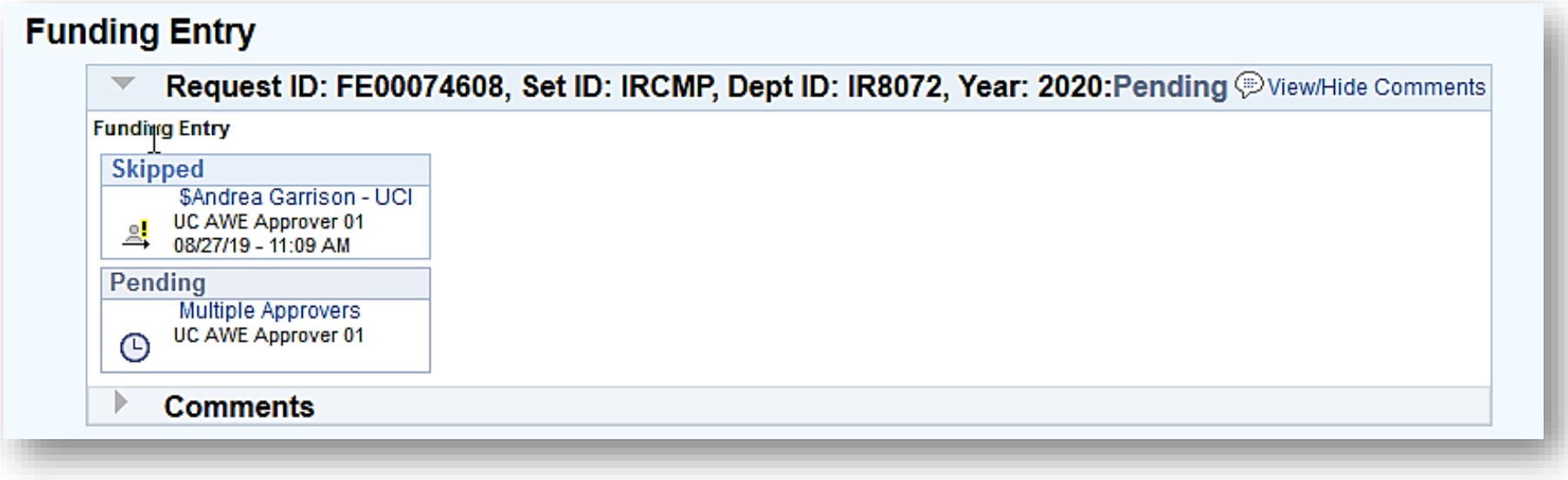
Submission from Funding Entry page

- The worksheet pulls the information into the Funding Entry page.
- You must click **Save** in order to get the **Submit** button.



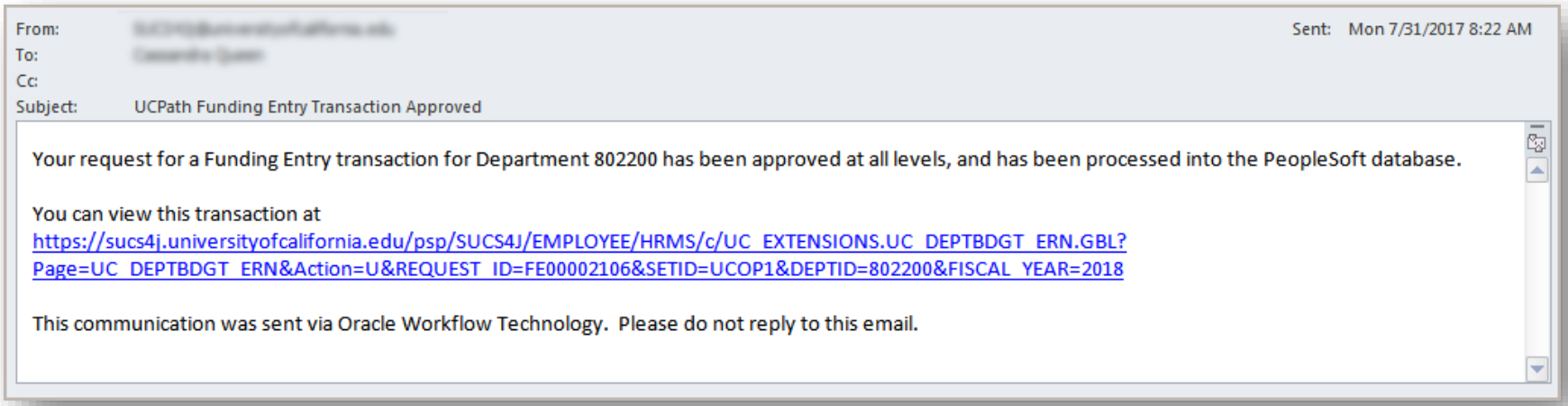
Funding Entry & Updates–Approval

All funding entry and updates trigger the **Approval Workflow Engine (AWE)**.



Approval Verification – Email Notification

After final approval of the funding entry or funding update, the system automatically sends an email notification to the department Initiator, which indicates the transaction is approved or denied.



From: [redacted] Sent: Mon 7/31/2017 8:22 AM
To: [redacted]
Cc:
Subject: UCPath Funding Entry Transaction Approved

Your request for a Funding Entry transaction for Department 802200 has been approved at all levels, and has been processed into the PeopleSoft database.

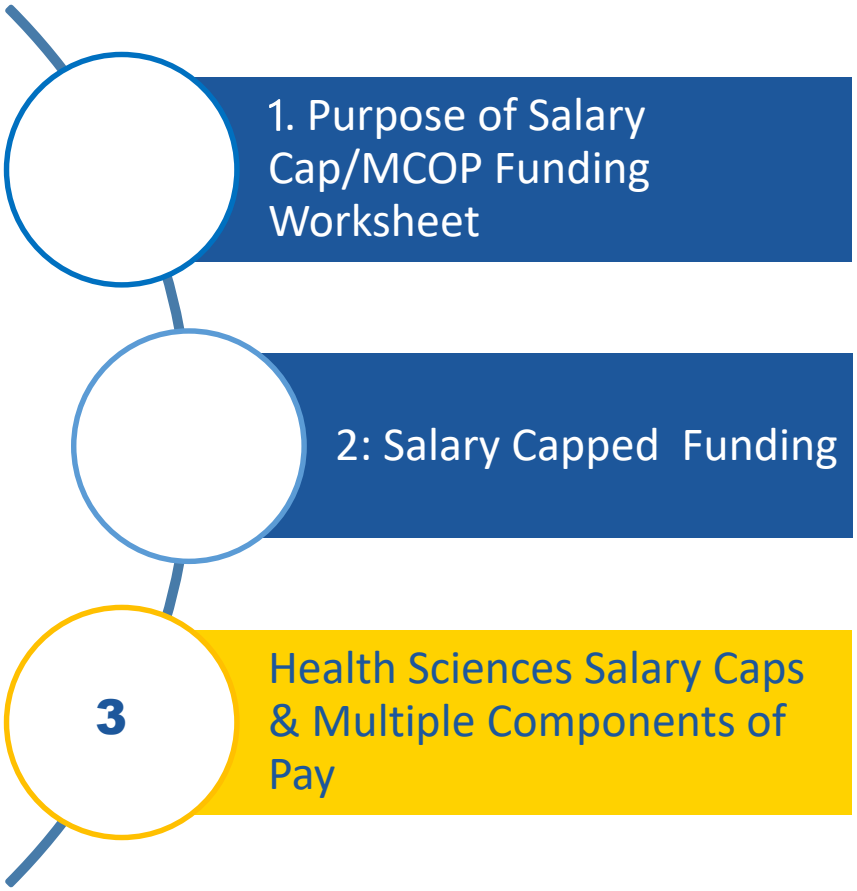
You can view this transaction at
https://sucs4j.universityofcalifornia.edu/psp/SUCS4J/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_DEPTBDGT_ERN.GBL?Page=UC_DEPTBDGT_ERN&Action=U&REQUEST_ID=FE00002106&SETID=UCOP1&DEPTID=802200&FISCAL_YEAR=2018

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.

LESSON 3

Health Sciences Salary Capped Funding & Multiple Components of Pay

Lesson Objectives

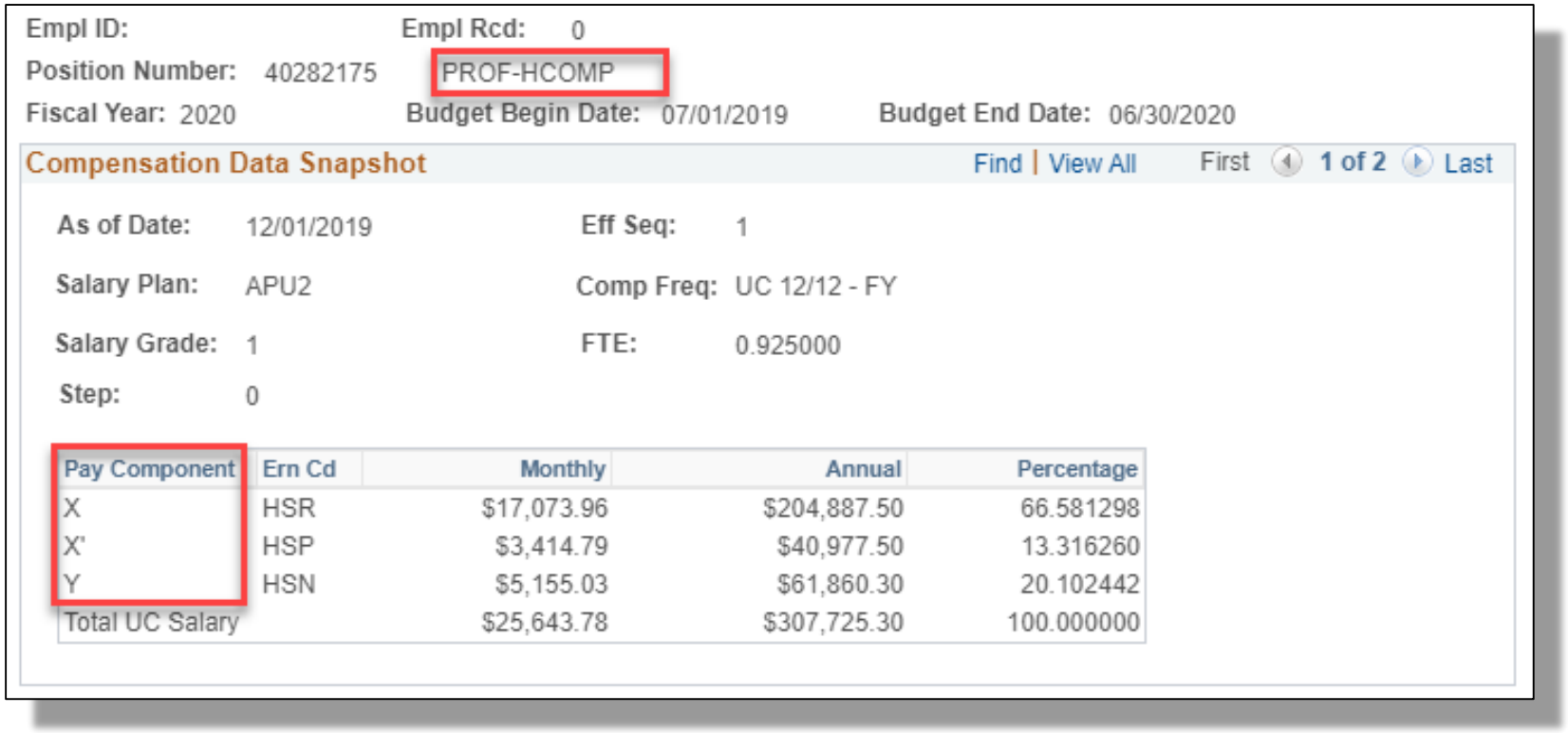


In this topic we will:

- Evaluate HCOMP Compensation Identifiers
- Review setting up compensation in Job Data
- Understand Job Earnings Distribution

Example of H-COMP Setup

College of Health Sciences has complex funding requirements due to the frequent use of Salary Caps & Multiple Components of Pay.



Empl ID: Empl Rcd: 0

Position Number: 40282175 PROF-HCOMP

Fiscal Year: 2020 Budget Begin Date: 07/01/2019 Budget End Date: 06/30/2020

Compensation Data Snapshot Find | View All First 1 of 2 Last

As of Date: 12/01/2019 Eff Seq: 1

Salary Plan: APU2 Comp Freq: UC 12/12 - FY

Salary Grade: 1 FTE: 0.925000

Step: 0

Pay Component	Ern Cd	Monthly	Annual	Percentage
X	HSR	$17,073.96	$204,887.50	66.581298
X'	HSP	$3,414.79	$40,977.50	13.316260
Y	HSN	$5,155.03	$61,860.30	20.102442
Total UC Salary		$25,643.78	$307,725.30	100.000000

CHOS X,Y&Z Pay Components

Pay Component	Faculty Salary and Benefits	Non-Faculty Academic/Staff
Additional/Other	Includes all salary not included in the X, Y, and Z payments faculty salary.	Includes all non-base salary, such as shift differentials and overtime.
Base & Negotiated	Includes X, X' and Y' components of faculty salary (Health Sciences Compensation Plan) as well as credits that impact base pay.	Includes regular salary and those salaries that are treated like regular pay as well as credits that impact base pay.
Faculty Bonuses/Incentives	Includes only the Z Payments of faculty salary (Health Sciences Compensation Plan)	N/A (exceptions for faculty who may also have multiple title codes where one may be a non-faculty academic or staff title code).

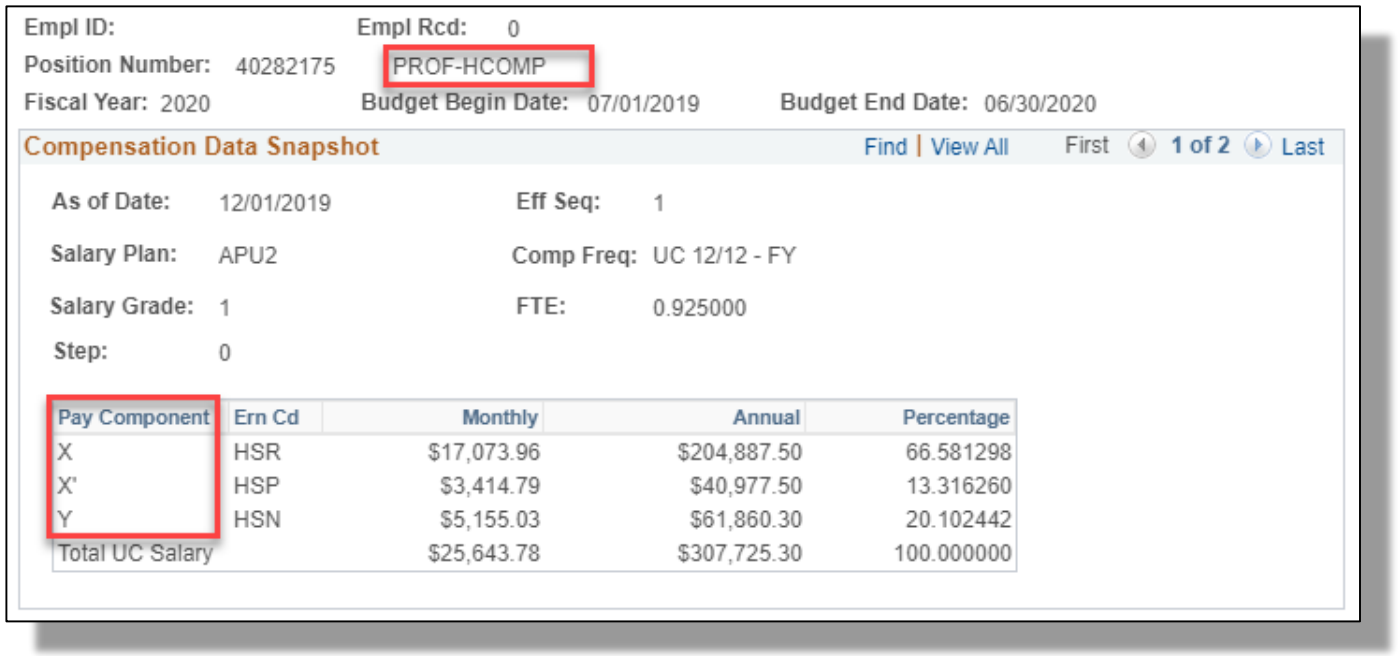
COMP Rate Codes

Comp Rate Code	Comp Rate Code Description	Earn Code	Earn Code Description
UCHSP	HSCP "X Prime" - Annual Rate	HSP	HSCP-Differential (X Prime)
UCHSX	HSCP "X" - Annual Rate	HSR	HSCP-Regular (X)
UCHSN	HSCP Negotiated [NOT FIRM]	HSN	HSCP-Negotiated (Y)
UCHSAP	HSCP Above Scale - X Prime	HSP	HSCP-Differential (X Prime)
UCHSAX	HSCP Above Scale - X	HSR	HSCP-Regular (X)
UCHSO1	HSCP Off Scale 1 (Eligible)	HOS	HSCP Off-Scale X Earnings
UCHSO2	HSCP Off Scale 2 (Ineligible)	HOS	HSCP Off-Scale X Earnings
UCHSO3	HSCP Off Scale 3 (Decrease)	HOS	HSCP Off-Scale X Earnings
UCHSY	HSCP Negotiated [FIRM]	HSN	HSCP-Negotiated (Y)
UCHSMA	HSCP Min Scale - Above Scale X	HSR	HSCP-Regular (X)
UCHSMP	HSCP Min Scale - X Prime	HSP	HSCP-Differential (X Prime)
UCHSMX	HSCP Min Scale - X	HSR	HSCP-Regular (X)
UCHMAP	HSCP Min - Above Scale X Prime	HSP	HSCP-Differential (X Prime)

H-COMP Compensation Identifiers

The example below provides a detailed snapshot of a professor of health sciences compensation funding. As shown below, the professor is compensated by three different funds:

- X= HSR Regular Salaried
- HSP= Regular Salaried Differential (X Prime)
- HSN= Negotiated Salary (Additional Compensation)



Empl ID: Empl Rcd: 0

Position Number: 40282175 PROF-HCOMP

Fiscal Year: 2020 Budget Begin Date: 07/01/2019 Budget End Date: 06/30/2020

Compensation Data Snapshot Find | View All First 1 of 2 Last

As of Date: 12/01/2019 Eff Seq: 1

Salary Plan: APU2 Comp Freq: UC 12/12 - FY

Salary Grade: 1 FTE: 0.925000

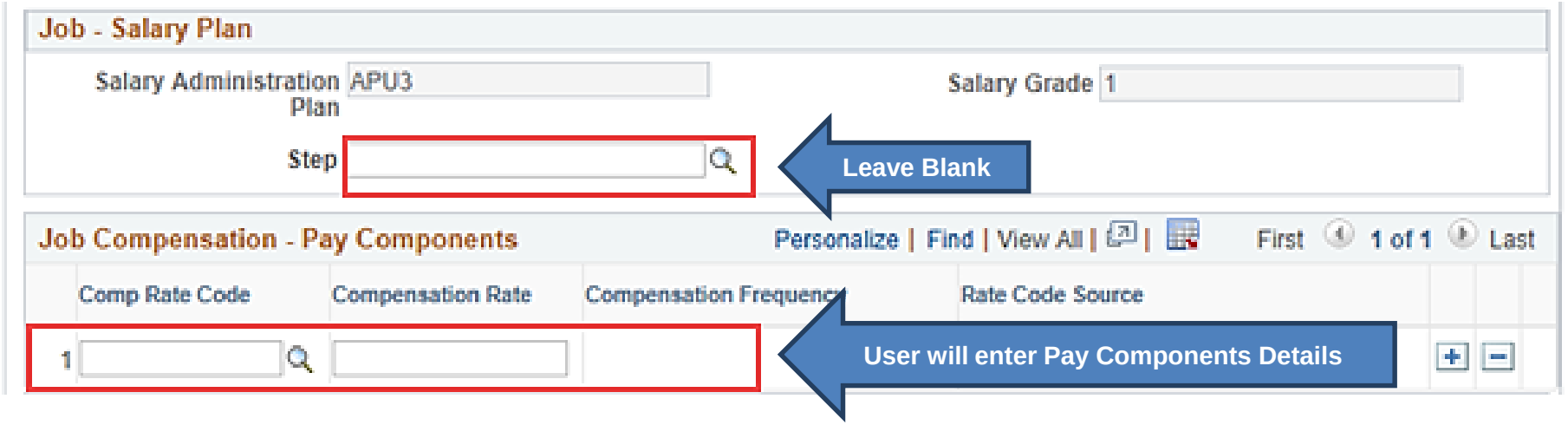
Step: 0

Pay Component	Ern Cd	Monthly	Annual	Percentage
X	HSR	$17,073.96	$204,887.50	66.581298
X'	HSP	$3,414.79	$40,977.50	13.316260
Y	HSN	$5,155.03	$61,860.30	20.102442
Total UC Salary		$25,643.78	$307,725.30	100.000000

Set up in Job Data

When an employee is hired, the compensation is entered on the Job Data tab using one of the Smart HR templates.

- The Salary Plan, Salary Grade and Step populates the Job Compensation – Pay Components section.
- When manually entering this information, leave the Step blank.

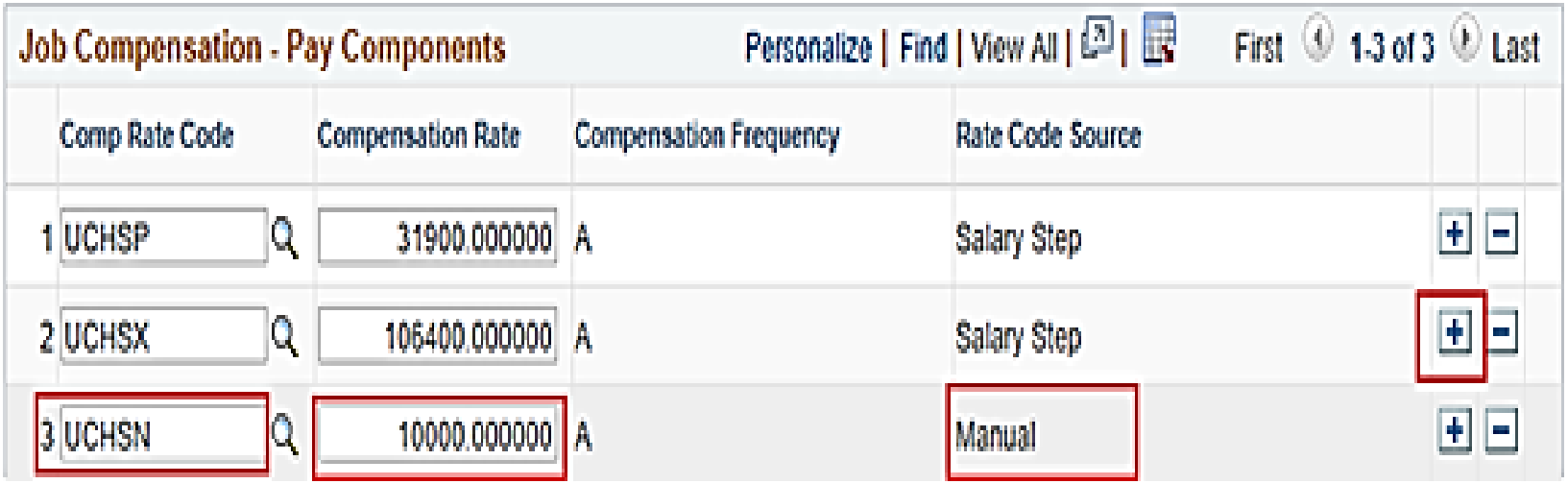


Adding Comp Rate Codes

X and X Prime and both derived from the salary steps.

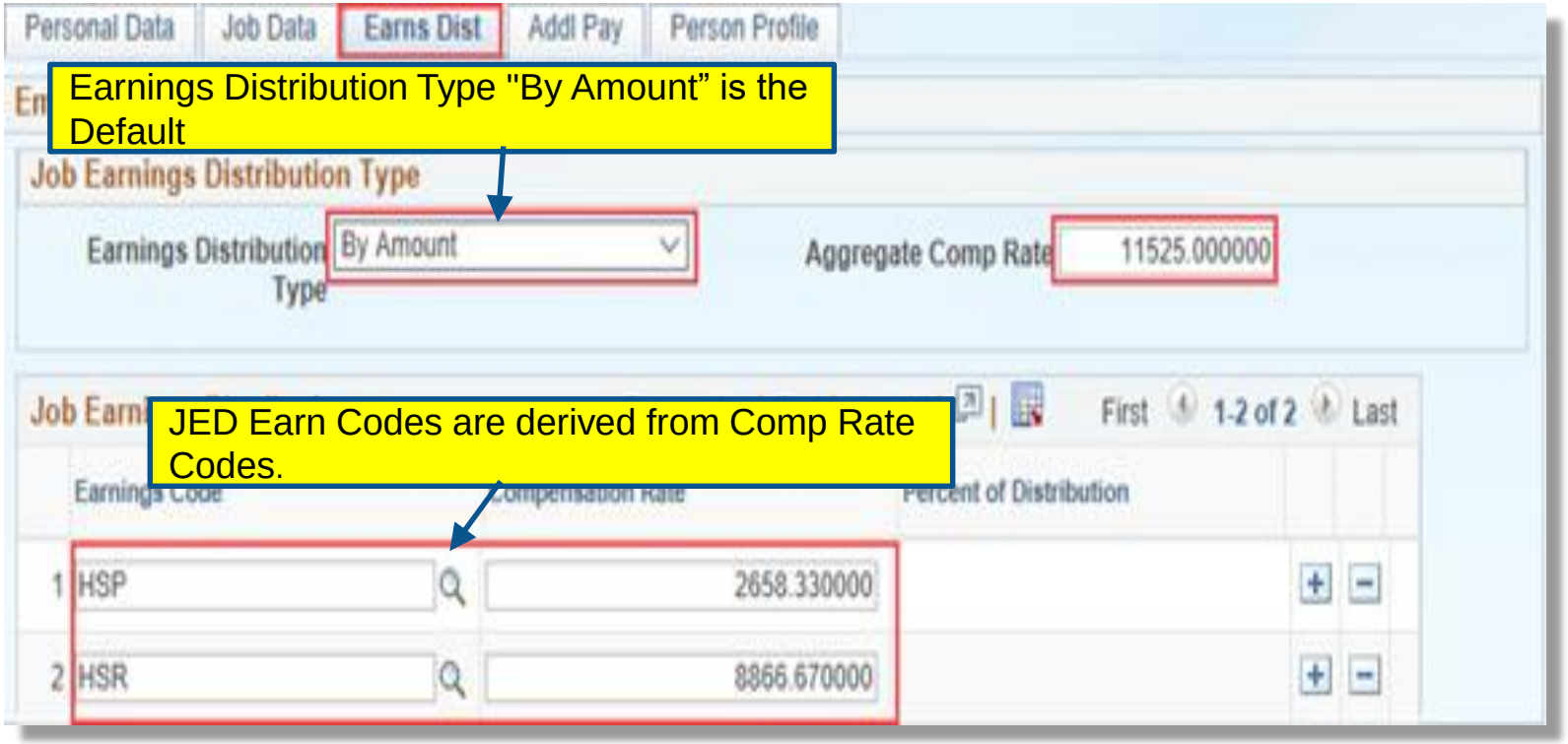
Adding a new row will allow the users to enter the COMP Rate code and COMP Rate Annual Percentage.

Note: When Adding Row, Rate Code Source will always read manual.



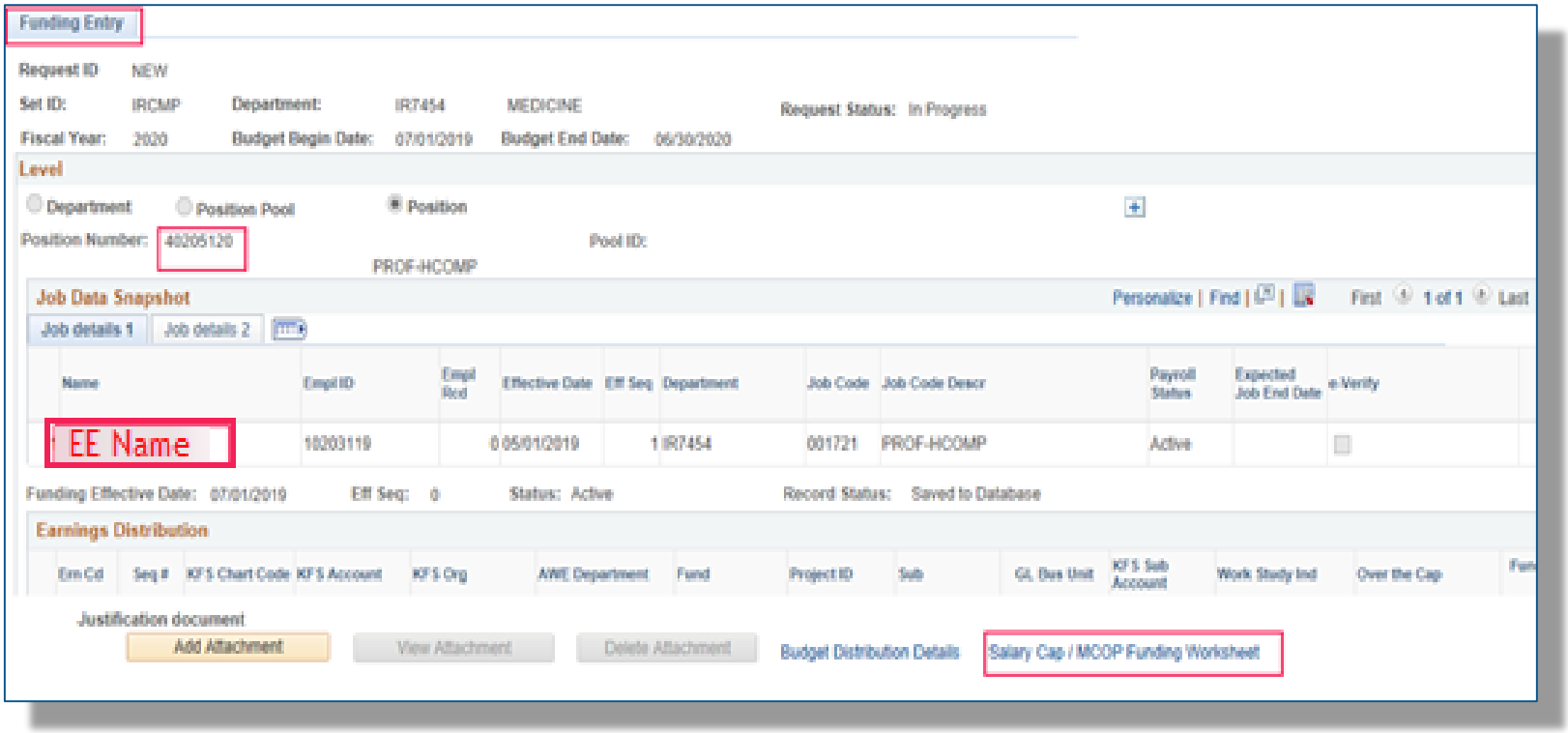
Job Earnings Distribution

Aggregate Comp Rate is derived based on the Compensation Rate Annual Amounts and FTE. This amount is the monthly amount the employee will receive for this compensation plan. This does not include additional pay, or pay from any other jobs.



H-COMP Funding Worksheet Availability

The newly created job must be approved and processed by UCPC to activate the Salary Cap/MCOP Worksheet hyperlink.

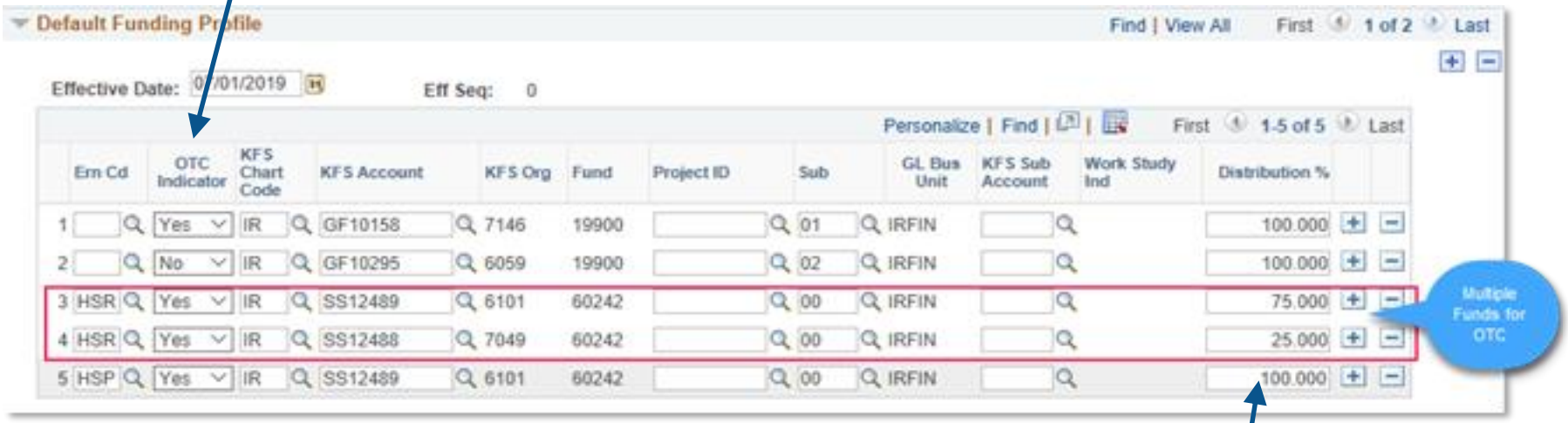


H-COMP Default Funding Profile

Default for OTC Indicator=No: recommended to always enter a default account.
Leave the Earn Code Blank, and then enter "No" for the OTC Indicator. Enter appropriate fund information. This will be the default for all rows that are NOT OTC, even when there is no Salary Cap.

Default for OTC Indicator=Yes: Leave the Earn Code blank, and entering "Yes" for the OTC indicator. Enter appropriate fund information. This will be the default for OTC Rows, if no others are specified.

Default for specific Earn Code: Enter Earn Code, set the OTC Indicator to Yes or No, as appropriate. Enter the funding information. Repeat for all Earn Codes as required.



Enter Distribution % for each row. For each Earn Code and OTC Indicator combination, the Distribution % must equal 100%.

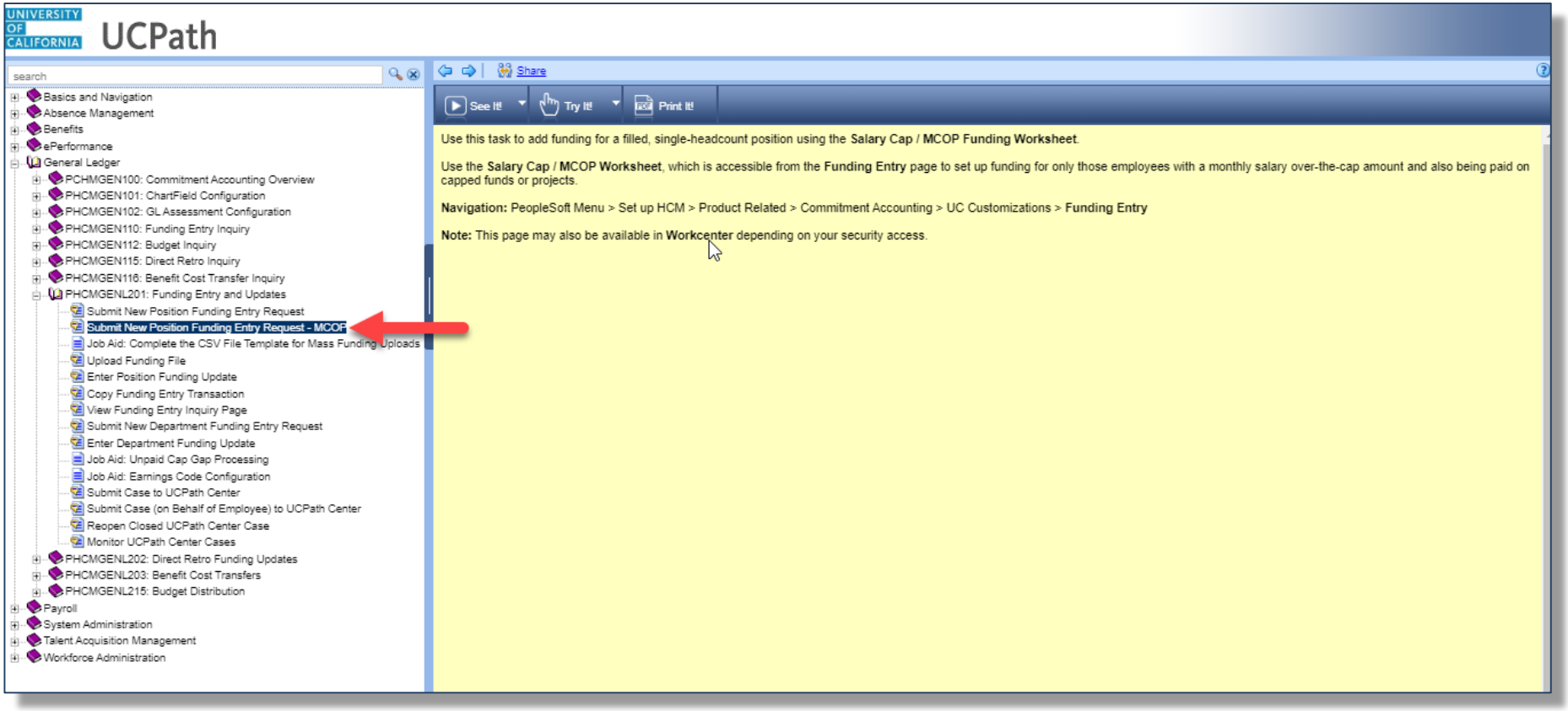
Instructor Demo

Initiate New Position Funding Entry Request - MCOP

- Watch as your instructor demonstrates how to initiate a personal data change template transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate New Position Funding Entry Request - MCOP* topic.
  - Launch the **See It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Course Review

User Productivity Kit Simulations(UPK) are available to provide users additional training demonstrations for your transactions.



Where to Get Help

- The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
  - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the **"Location Users"** link to open the site. **An Adobe PDF version is available for users with screen readers.*

- If you're experiencing issues, or have questions about transactions, please contact the **Employee Experience Center** at (949) 825- 0500, or submit a ticket by visiting **UCPath.UCI.Edu**

Training End

Thank You!