PayPath Transactions
Part 1

Introductions

Instructor

- Name
- UCI role
- UCPath role
- Years at UC
- Functional experience

Attendees

- Name
- University role
- Years at UCI
- Expectations for this training

Training Logistics

Safety & Housekeeping

- Emergency evacuation procedures
- Restrooms
- Course duration
- Breaks

Classroom Etiquette

- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room

Parking Lot

- Capture any questions or concerns that cannot be addressed during class
- Place question in appropriate location

Course Agenda

1: PayPath Transactions Overview

2: Position Data Changes

3: Job Data Changes

4: Additional Pay

Table of Contents

Course Objectives

By the end of this course, you should be able to:

- Understand the PayPath Transaction system process.
- Describe the PayPath Actions entry pages.
- Describe the PayPath transaction action and reason codes.
- Enter position data change PayPath transactions.
- Initiate job data change PayPath transactions.
- Create additional pay PayPath transactions.

Key Concepts & Vocabulary

UCPath Term	Definitions
Action/Action Reason:	Used to describe the type of job/position data recorded in UCPath.
Additional Pay:	Any amount paid to an employee which is in addition to the employee’s regular, base compensation.
Approval Workflow Engine (AWE):	UCPath functionality that routes transactions in UCPath to designated roles (e.g., Initiator or Approver). Upon approval, transactions are either routed to the UCPath Center (UCPC) for finalization or are finalized in UCPath.
Effective Date:	Used to maintain and view a complete chronological record of historical, current and future data.
Incumbent:	An employee assigned to a Position.
One Time Pay:	One-time Payments apply to a single pay cycle (e.g., not recurring and non-consecutive pay cycles), and includes both methods for individual and mass entry.

Key Concepts & Vocabulary (cont.)

UCPath Term	Definitions
Position Control:	An AWE-enabled online page that must be used to create new Positions and to update vacant Positions.
Recurring Pay:	Consecutive, recurring pay in addition to an Employees' base compensation, including: recurring stipends, By-Agreement Payments.
Retroactive Effective Date:	Date prior to the current pay period begin date.
Short Work Break (SWB):	A status that temporarily takes an employee off of pay status when a leave action is not appropriate, where permitted by policy or collective bargaining agreement.
Workforce Administration (WFA):	Workforce Administration is a lesson in UCPath where personal data, job data, reporting and tracking for Employees, Contingent Workers, and Persons of Interest is administered, managed and stored. This is similar to the Employee Data Base (EDB) in PPS today.

Lesson 1

PayPath Transactions Overvie

Lesson Objectives

1 PayPath Transactions Overview

2: Position Data Changes

3: Job Changes

4: Additional Pay

In this lesson you will learn how to:

- Identify the transactions performed using **PayPath Actions**.
- Describe the PayPath Transaction system process.
- Identify the PayPath transaction action and reason codes.
- Describe the **PayPath Actions** entry pages.

PayPath Actions – Overview

- **PayPath Actions** is a custom component designed to streamline updates to employee data in UCPath.
- The **PayPath Actions** component provides intuitive, compliant functionality that is designed to meet UC's academic and staff requirements. This component offers a one-stop-shop for processing various types of transactions and the flexibility to submit multiple actions in a single transaction.
- PayPath integrates changes to position data, job data and additional pay, providing a tight integration between HR actions and funding requirements.
- The PayPath pages and fields that you typically update for an employee are grouped together in one component instead of having to navigate to each page separately.

PayPath Actions – Additional Notes

- If a PayPath transaction affects compensation, funding reallocates to ensure that all components of pay are allocated to the correct fund source after the transaction is processed. PayPath also ensures that the salary cap and other funding compliance requirements are followed. If necessary, employees with certain roles can update funding via Funding Entry page upon notification of a job change.
- **Only active employee records** (Active, Paid Leave, Unpaid Leave or Short Work Break, including **future hires**) will be accessed through PayPath.
- **PayPath will be accessed by employee record**. Therefore, if an employee has more than one job, each record will have to be updated separately.
- When the transactions are submitted and approved, the information is updated based on the **effective date** entered.
- There is a combination of both **pre and post-save edits** to validate the data before it is committed.

Transactions Processed in PayPath Actions

The following types of transactions are processed for staff and academic employees using **PayPath Actions**.

PayPath Actions Transactions
Position Data Changes
Job Data Changes
Additional Pay

- Position data changes can be made only for positions that have a single active incumbent.
  - New or vacant positions must be created/updated using a **Position Control Request**.
- **PayPath Actions** is not used to hire, terminate, transfer to a new position or place employees on a leave of absence.

PayPath Actions – Examples

Examples of changes requested through **PayPath Actions**:

- Academic Merit, Promotion or Change in Series
- Retro Academic Merits, Promotions, Series Changes
- Position and/or Job Data FTE Changes
- Salary Only Changes / Pay Rate Changes
- Short Work Break / Return from Short Work Break
- Abeyance / Return from Abeyance
- Recurring Additional Pay Payments
- Employee Reduction In Time (ERIT)
- Probationary Status and Trial Employment Changes

PayPath Actions – Components

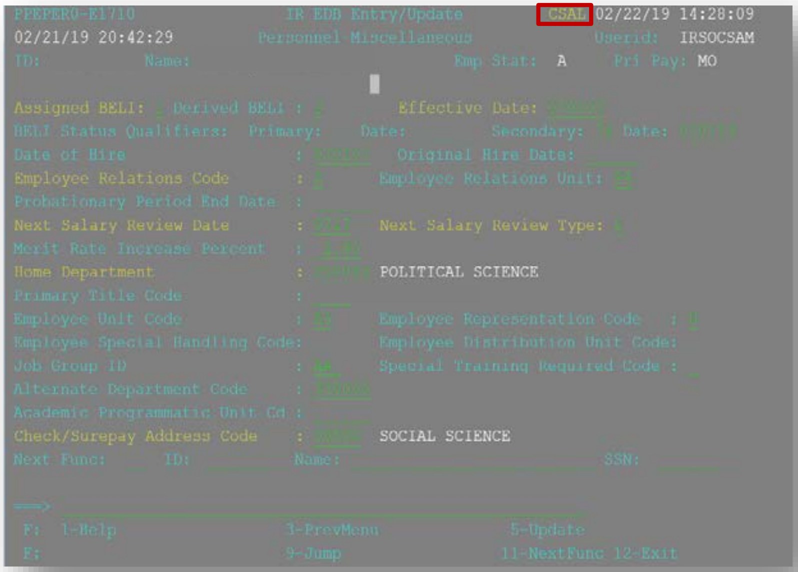
There are two **PayPath Actions** components, one for academic and one for staff. The appropriate component displays based on the type of employee selected.

Some examples of the differences between Academic and Staff components:
Some fields display values as applicable for staff or academic. For example: position data and job data **Action**/**Action Reason** fields and valid **Comp Rate Codes**.
The **Employee Class** field is display-only for academic employees (derived from **Job Code**), versus editable for staff employees.
Job Data page, under **UC Job Data** section, different fields are visible as relevant to staff or academic. For example, staff employees have fields related to **Probation** and **Probation Date**, while academic employees have dates such as **Post Docs Anniversary Date** and **Academic Duration of Appt**.

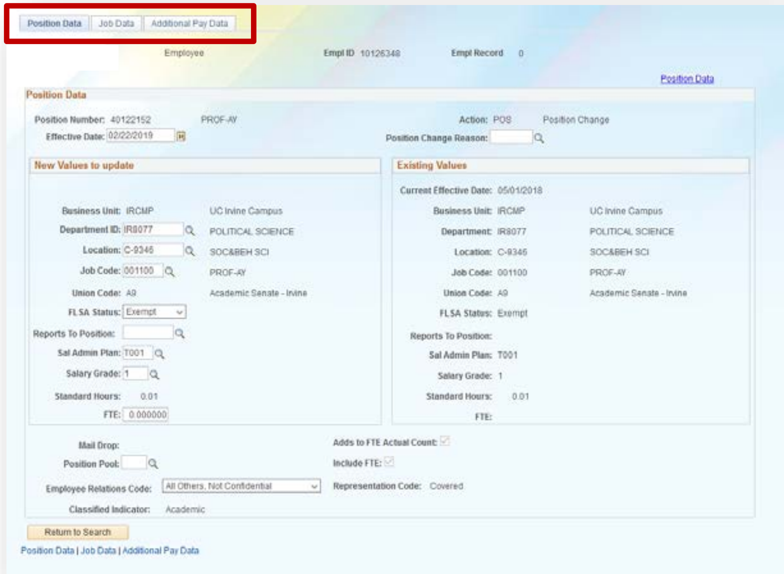
PPS and PayPath

In UCPath, Initiators will use **PayPath** to update job information for existing employees. In comparison, PPS Processers used the CSAL bundle in PPS to make similar changes.

PPS - CSAL (Classic View)



UCPath - PayPath



Person Organizational Summary Overview

- Use the **Person Org Summary** page to view a summary of an employee's current organizational relationships, including HR and payroll status, primary job assignment and other current job assignment details.
- This page displays current employee information for all organizational relationships: Employee, Contingent Worker (CWR) and Person of Interest (POI).
  - An employee may have more than one organizational relationship concurrently. For example, the person may be an employee at one UC Location and a CWR at another.
- This page does not have row-level security. If you have access to this page, you can view job assignment information for all employee records across all locations.
- *This page does not display historical or future-dated employment details*.

Person Organization Summary

Navigation: PeopleSoft Menu > Workforce Administration > Personal Information > **Person Organizational Summary**

If there is more than one row of data, click the **View All** link to view all current information.

Person Organizational Summary

Person Organizational Summary

David Johnson

Person ID 10015018

Benefit Eligibility Hours
Limited Hours Career
Floater Hours Career

Employment Instances — Find | View 1 — First 1-2 of 2 Last

ORG Instance 0 — HR Status Inactive — Last Hire 01/29/2016
Primary Job: ☐ — Payroll Status Terminated — Termination Date 03/23/2018 Resign - No Reason Given

Assignments — Personalize | Find | — First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
0	ASLA1	40011782	152	MTW	004921	STDT 2		0.100000	Student: Casual/Restricted	99	N	AST	H	None	

ORG Instance 1 — HR Status Inactive — Last Hire 01/29/2016
Primary Job: ☑ — Payroll Status Terminated — Termination Date 03/14/2019 Resign - No Reason Given

Assignments — Personalize | Find | — First 1 of 1 Last

Empl Record	Business Unit	Position Number	Dept ID	Department Description	Job Code	Description	Expected Job End Date	FTE	Employee Class	Union Code	FLSA Status	Pay Group	Employee Type	Probation Code	Probation End Date
1	ASLA1	40011803	207	Catering	004922	STDT 1	10/31/2019	0.100000	Student: Casual/Restricted	99	N	AST	H	None	

Return to Search | Previous in List | Next in List | Notify

PayPath Transaction – System Process

PayPath Initiator

Navigate to **PayPath Actions** component

PayPath Initiator

Enter and Submit PayPath Transaction

AWE

PayPath Approver

Review / Approve PayPath Transaction

All

View Employee Data

PayPath Actions AWE

All **PayPath Actions** transactions are routed for approval using the Approval Workflow Engine (AWE).

The AWE approval routing for a **PayPath Actions** transaction is based on:

- Security role tied to the PayPath Initiator (for example: Central vs. Department).
- Approval routing configuration by Location (Business Unit). For example, number of approval levels required.

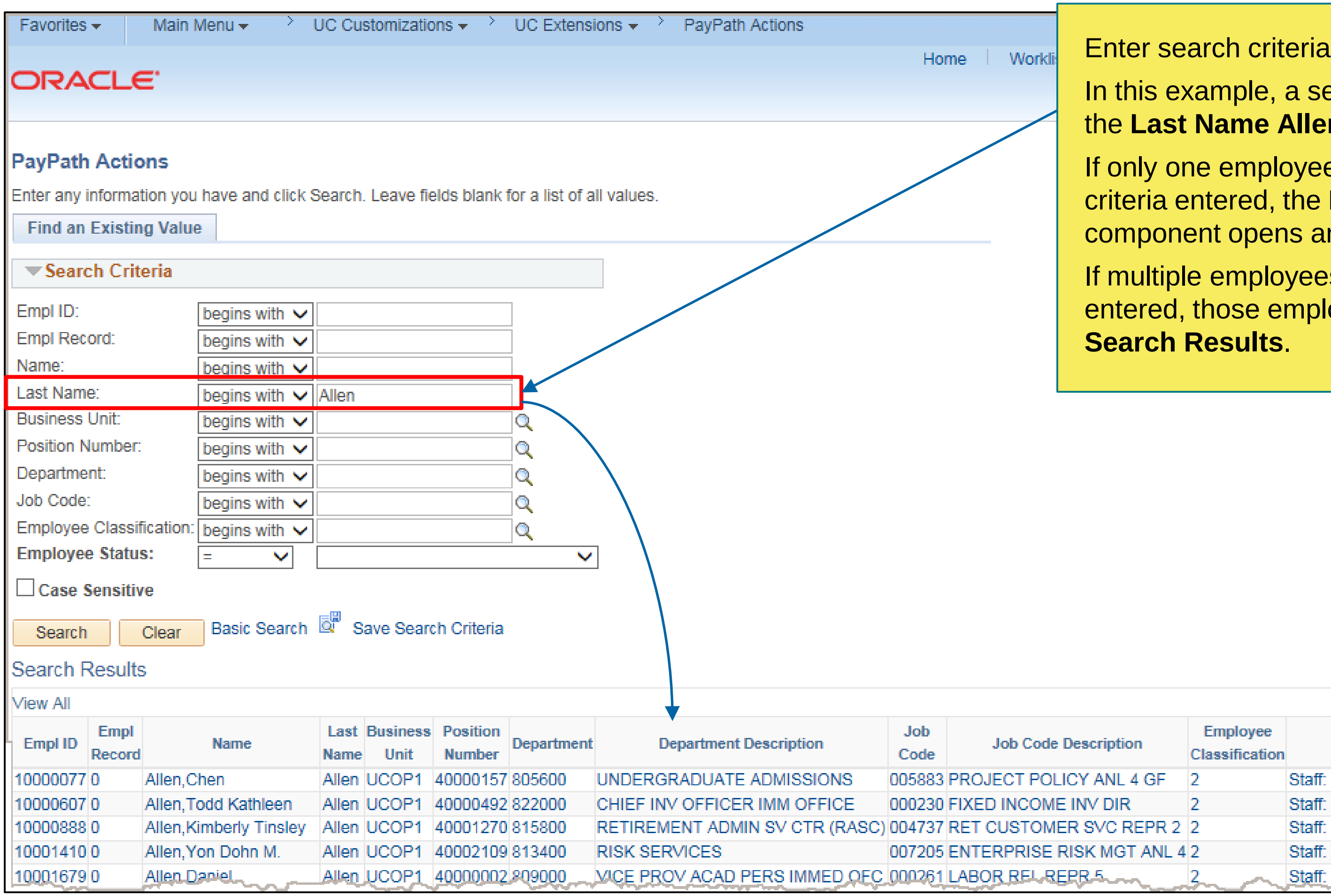
AWE security role assignment and approval routing configuration is determined by each Location's business process.

AWE will only be triggered once when a PayPath transaction is submitted, even if all 3 pages have updated data.

Upon final approval, the transaction changes are visible in the system. Additional Pay updates are in a staging process for processing by UCPC.

Introduction to PayPath Actions

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > **PayPath Actions**



Enter search criteria to locate the employee.

In this example, a search was performed on the **Last Name Allen**.

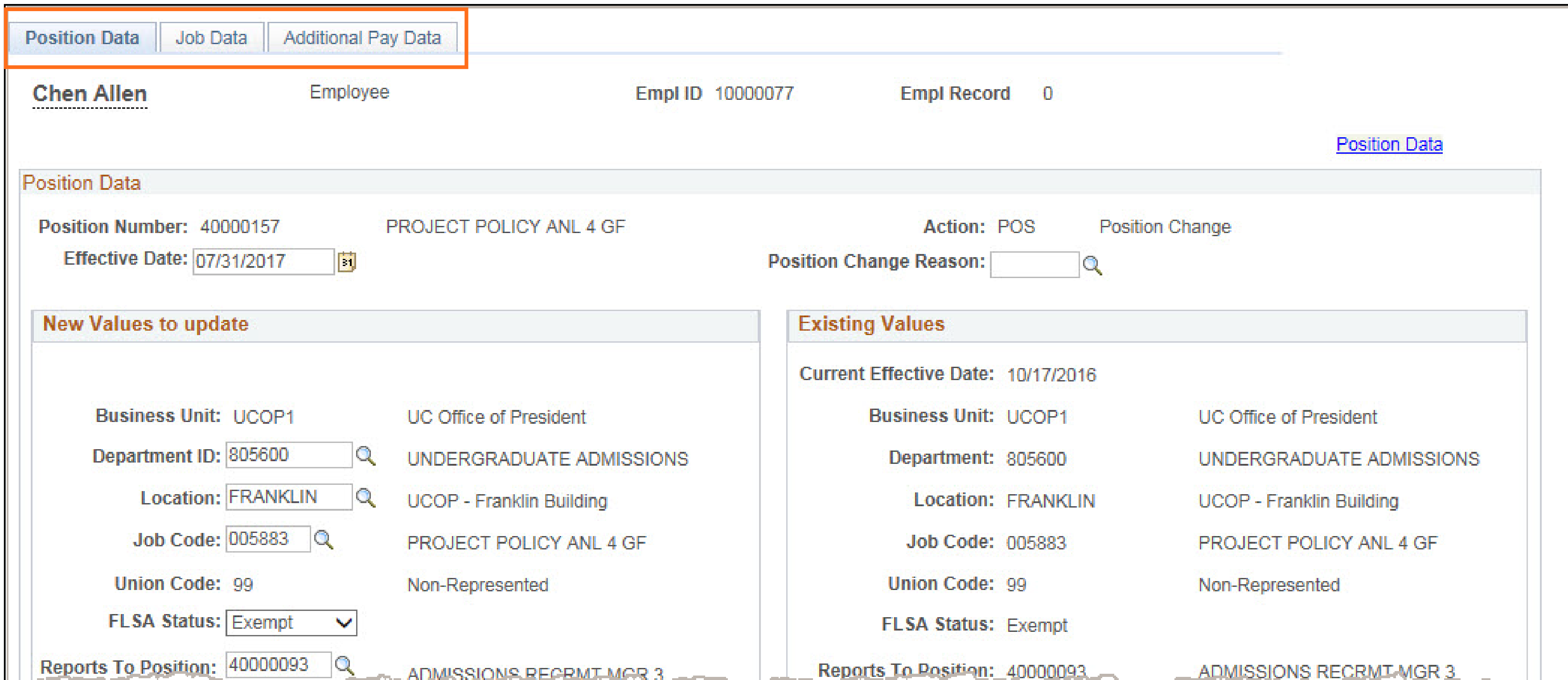
If only one employee matches the search criteria entered, the **PayPath Actions** component opens and displays the employee.

If multiple employees match the search criteria entered, those employees display in the **Search Results**.

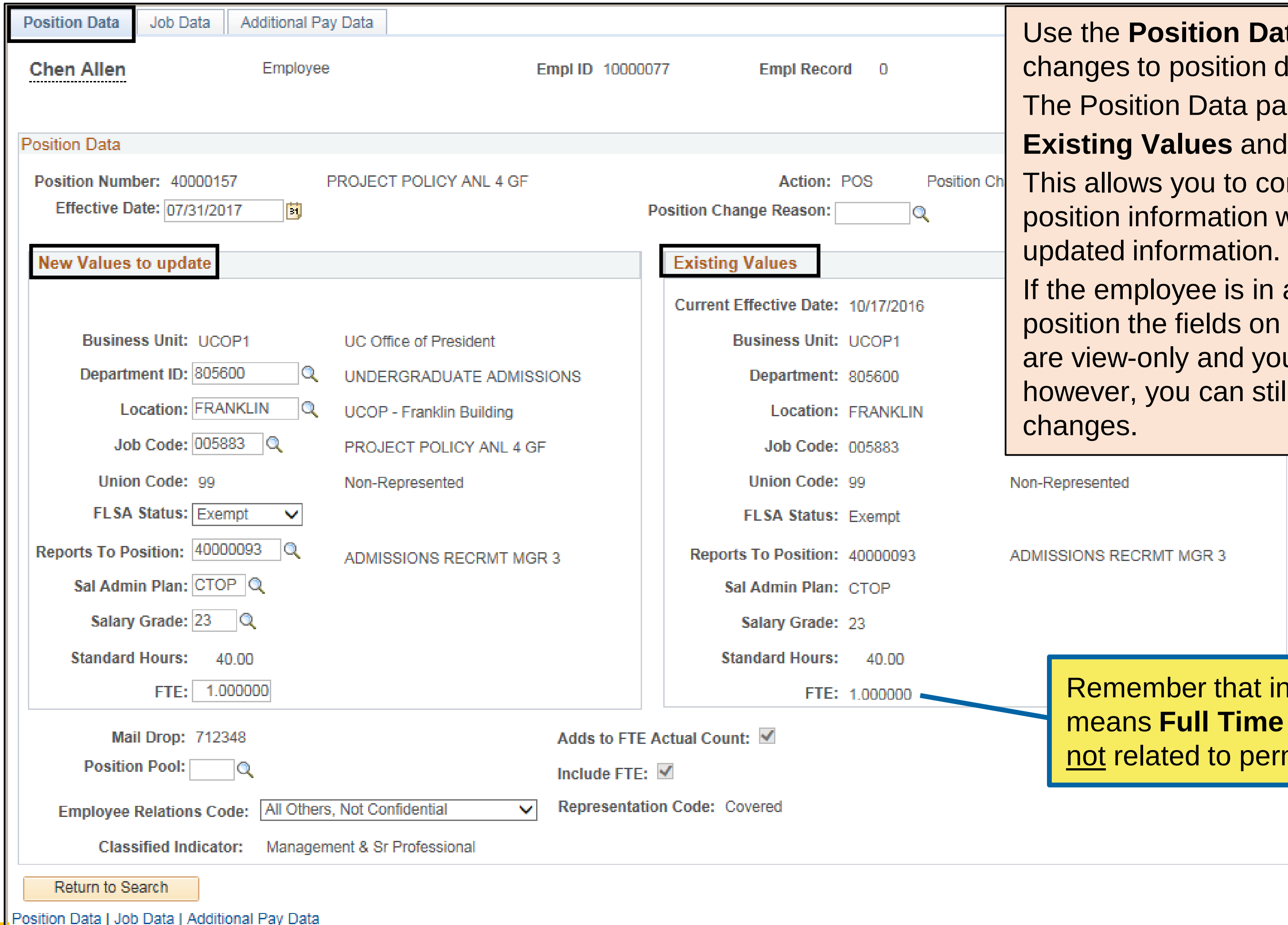
PayPath Actions Component

The **PayPath Actions** component is comprised of three pages: **Position Data**, **Job Data** and **Additional Pay Data**.

Navigate to the appropriate page to enter the related update.



PayPath Actions – Position Data Page



Position Data | Job Data | Additional Pay Data

Chen Allen Employee Empl ID 10000077 Empl Record 0

Position Data

Position Number: 40000157 PROJECT POLICY ANL 4 GF Action: POS Position Ch

Effective Date: 07/31/2017 Position Change Reason:

New Values to update

Business Unit: UCOP1 UC Office of President

Department ID: 805600 UNDERGRADUATE ADMISSIONS

Location: FRANKLIN UCOP - Franklin Building

Job Code: 005883 PROJECT POLICY ANL 4 GF

Union Code: 99 Non-Represented

FLSA Status: Exempt

Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3

Sal Admin Plan: CTOP

Salary Grade: 23

Standard Hours: 40.00

FTE: 1.000000

Existing Values

Current Effective Date: 10/17/2016

Business Unit: UCOP1

Department: 805600

Location: FRANKLIN

Job Code: 005883

Union Code: 99 Non-Represented

FLSA Status: Exempt

Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3

Sal Admin Plan: CTOP

Salary Grade: 23

Standard Hours: 40.00

FTE: 1.000000

Mail Drop: 712348 Adds to FTE Actual Count:

Position Pool: Include FTE:

Employee Relations Code: All Others, Not Confidential Representation Code: Covered

Classified Indicator: Management & Sr Professional

Return to Search

Position Data | Job Data | Additional Pay Data

Use the **Position Data** page to enter changes to position data.

The Position Data page provides two areas:

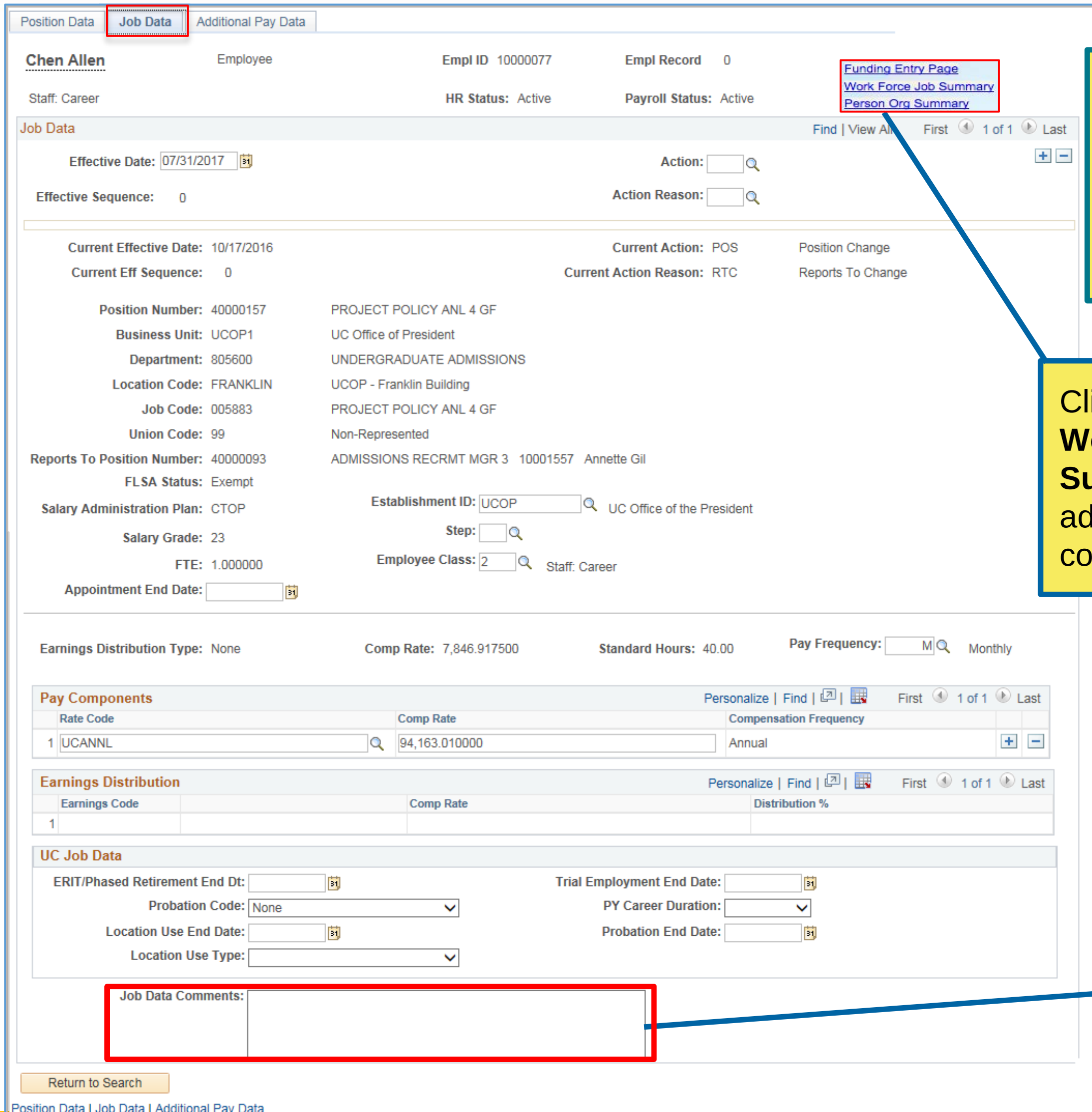
Existing Values and **New Values** to update.

This allows you to compare the existing position information while you enter the updated information.

If the employee is in a multi-headcount position the fields on the Position Data page are view-only and you cannot enter changes; however, you can still enter Job Data changes.

Remember that in UCPath FTE means **Full Time Equivalent,** it is <u>not</u> related to permanent budget.

PayPath Actions – Job Data Page


Position Data | Job Data | Additional Pay Data

Chen Allen — Employee — Empl ID 10000077 — Empl Record 0

Staff: Career — HR Status: Active — Payroll Status: Active

Funding Entry Page
Work Force Job Summary
Person Org Summary

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

Effective Date: 07/31/2017 — Action:

Effective Sequence: 0 — Action Reason:

Current Effective Date: 10/17/2016 — Current Action: POS — Position Change

Current Eff Sequence: 0 — Current Action Reason: RTC — Reports To Change

Position Number: 40000157 — PROJECT POLICY ANL 4 GF

Business Unit: UCOP1 — UC Office of President

Department: 805600 — UNDERGRADUATE ADMISSIONS

Location Code: FRANKLIN — UCOP - Franklin Building

Job Code: 005883 — PROJECT POLICY ANL 4 GF

Union Code: 99 — Non-Represented

Reports To Position Number: 40000093 — ADMISSIONS RECRMT MGR 3 10001557 Annette Gil

FLSA Status: Exempt

Salary Administration Plan: CTOP — Establishment ID: UCOP — UC Office of the President

Step:

Salary Grade: 23

FTE: 1.000000 — Employee Class: 2 — Staff: Career

Appointment End Date:

Earnings Distribution Type: None — Comp Rate: 7,846.917500 — Standard Hours: 40.00 — Pay Frequency: M — Monthly

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

	Rate Code	Comp Rate	Compensation Frequency
1	UCANNL	94,163.010000	Annual

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

	Earnings Code	Comp Rate	Distribution %
1			

UC Job Data

ERIT/Phased Retirement End Dt: — Trial Employment End Date:

Probation Code: None — PY Career Duration:

Location Use End Date: — Probation End Date:

Location Use Type:

Job Data Comments:

Return to Search

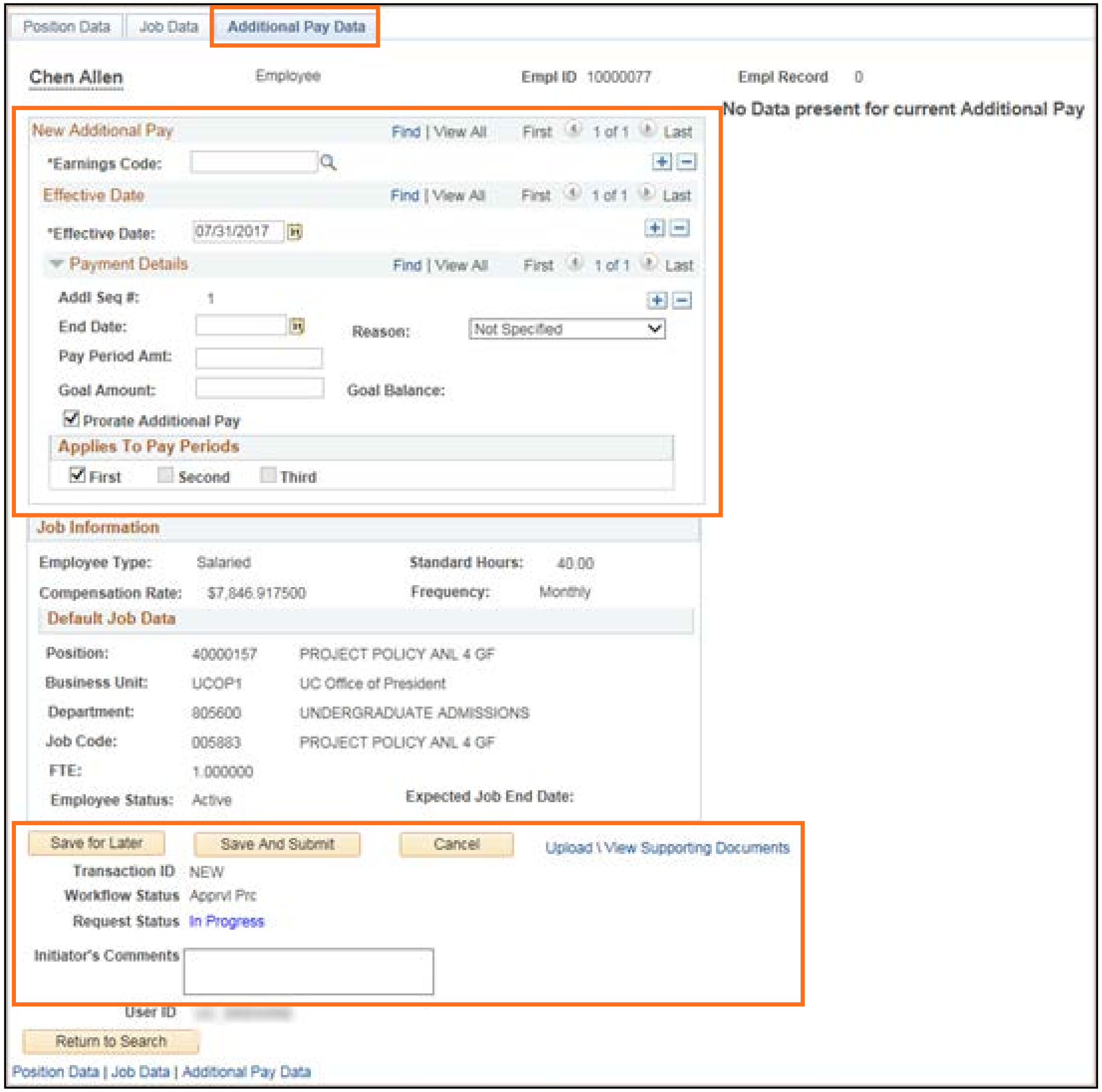
Position Data | Job Data | Additional Pay Data

Use the **Job Data** page for various job data changes. The fields and values available on the **Job Data** page change depending on whether the employee selected from the search is an academic or staff employee.

Click on the **Funding Entry Page, Workforce Job Summary** and **Person Org Summary** links on this page to access additional information for reference, such as compensation, FLSA data and FTE data.

Use the **Job Data Comments** to record details about the position and/or job changes that are entered. This note is stored directly in the employee's **Job Data** for reference.

PayPath Actions – Additional Pay Data Page



Use the top portion of the **Additional Pay Data** page to enter one-time or recurring additional pay information for an employee. If the employee has current additional pay information, it appears on the right side of the page.

The middle section provides details about the employee's current **Job Information**.

Use the bottom portion of this page to:

- Upload or view supporting documents.
- Enter comments to the Approver.
- View the **Transaction ID**, **Workflow Status** and **Request Status**.

The buttons allow you to save the transaction for later processing, submit the transaction for approval or cancel the transaction.

Note that Additional Pay data is not loaded directly to UCPath after approval, as is the case for Position and Job Data. Additional Pay data is loaded to the Additional Pay Staging table and reviewed and loaded by UCPath Payroll.

PayPath Actions – Effective Dates

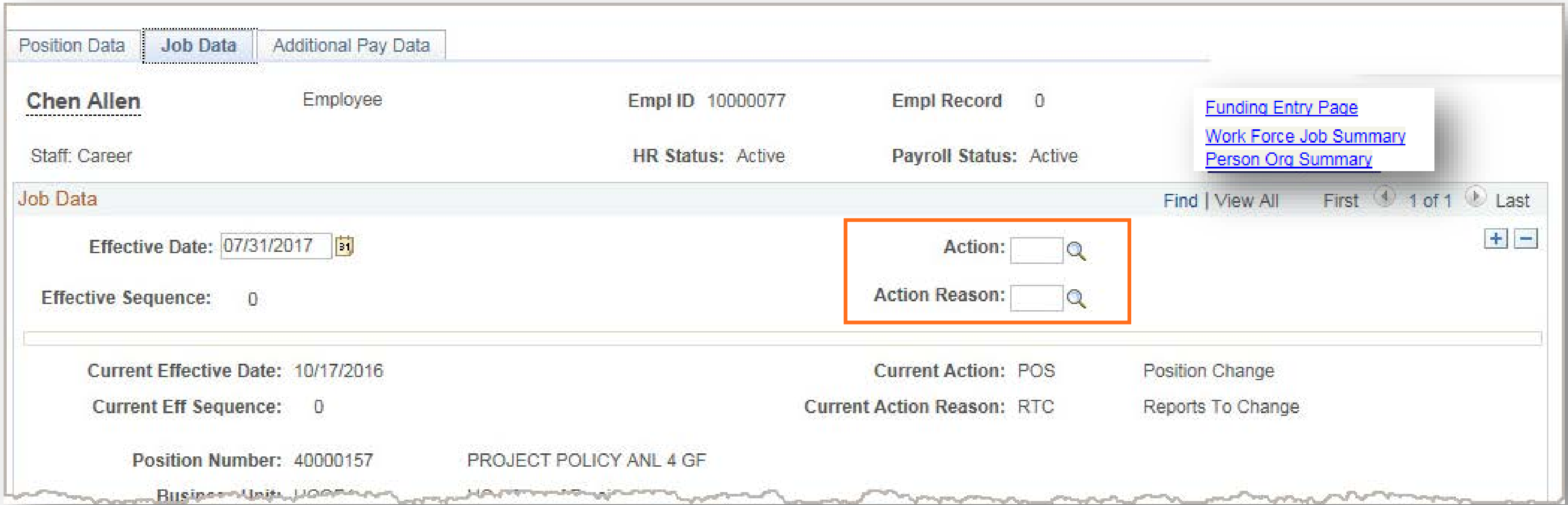
- Each **Position Data** and/or **Job Data** transaction must have the same **Effective Date**.
  - UCPath prevents the entry of multiple effective dates.
    a) After you enter the **Effective Date** on one of the tabs, the field becomes view-only on the other tabs and for new rows.
  - If you have changes that fall on different effective dates, you must enter a separate PayPath transaction for each effective date. Also, you must wait until the first PayPath transaction has completed the approval process before entering the next transaction.
- Exception for **Additional Pay Data**:
  - You can enter multiple Effective Dates for **Additional Pay Data** transactions.

Retroactive Changes

- Changes can be entered retroactively for **Position Data** and **Job Data**.
  - If a retro date is prior to the UCPath conversion date, it must be submitted to UCPath Center via a case.
- After the change is approved, it is saved to UCPath and the update is applied to the appropriate component in the appropriate row according to the **Effective Date**.
- For position and job updates, all rows of data after the retro change are also updated.
- The **PayPath Actions** pages display the latest effective dated row. Keep in mind that this could be a future dated row.
  - To view all rows of employee data, access the **Workforce Job Summary** page directly from the PayPath Actions **Job Data** page.
- *This topic will be further discussed in PayPath Transactions Part 2.*

PayPath Transactions – Action/Action Reason Codes

- **Action** and **Action Reason** codes further define the purpose of position data change and job data change transactions.
- You must specify the appropriate **Action** and **Action Reason** codes when a PayPath transaction is initiated.
- For **Position Data** there is only one **Action**: **POS**.



PayPath Action/Action Reason Codes – Examples per page

This chart lists some examples of changes that can be made in via each PayPath page together with associated **Action Reason Codes**.

PayPath Transactions	Examples
Position Data Changes	*PIT* – Permanent Increase In Time (FTE) *PRI* – Permanent Reduction - Layoff *REO* – Re-Organization/Restructure Position *RTC* – Reports To Change *SEC* – Series Change
Job Data Changes	*EXP* – Extend Expected Return Date *EXT* – Add/Extend Appointment *JED* – Job Earnings Distribution *PAY/ EQU* – Equity *PAY/STI* – Step Increase/Progression *SWB* – Short Work Break
Additional Pay (*one-time or recurring*)	*XSL* – Star Award Local *SAS* – Stipend-Admin-Staff

Job Aid

PayPath Transactions – Action Codes, Reason Codes and Descriptions

- This is your opportunity to review the job aid.
  - **Academic**: Open the UCPath Help site and refer to the ***PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)*** topic.
  - **Staff**: Open the UCPath Help site and refer to the ***PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)*** topic.

- If you need help, Ask your instructor for assistance.

PayPath Overview – Key Takeaways

- **PayPath** is a set of online pages in UCPath that streamlines employee data updates.
- **PayPath** Actions transactions consist of position data changes, job data changes, and additional pay.
- All **PayPath** Actions transactions route through AWE in pending status. No additional PayPath Actions transactions can be entered for the employee until the pending transaction is processed by the designated approvers.
- If an employee has more than one job, each record must be updated with a separate PayPath transaction.
- PayPath allows historic, current or future updates for **position data**, **job data** and additional pay.
- **Action** and **action/reason** codes further define position and job data transactions. For **position data** there is only one **action**: **POS**.

Lesson Objectives Review

Having completed this lesson, you should now be able to:

- Identify the transactions performed using **PayPath Actions**.
- Describe the PayPath transaction system process.
- Identify the PayPath transaction action and reason codes.
- Describe the **PayPath Actions** entry pages.

Knowledge Check

- You now have the opportunity to assess your knowledge of the information presented in this lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Multiple Choice

Transactions that are initiated using the **PayPath Actions** component include:

A. Position Data Changes

B. New Hires

C. Job Data Changes

D. All of the above

E. A and C

Response Feedback

Sorry, Incorrect!

Multiple Choice

Continue…

Try Again…

Response Feedback

That is Correct!

Continue…

True or False

All **PayPath Actions** transaction are routed for approval using the Approval Workflow Engine (AWE).

TRUE

FALSE

Next

Response Feedback

Sorry, Incorrect!

Correct Answer: TRUE

Continue…

True or False

An **Action** and **Action Reason** code is needed only for pay rate job data changes.

TRUE

FALSE

Next

Response Feedback

Sorry, Incorrect!

- **Correct Answer: False.** An **Action** and an **Action Reason** code must be entered for every **Job Data** change transaction.

Continue…

Lesson 2

Position Data Changes

Lesson Objectives

1: PayPath Transactions Overview

2 Position Data Changes

3: Job Changes

4: Additional Pay

In this lesson you will learn how to:

- Describe the key system steps to complete a position data change PayPath transaction.
- Initiate position data change PayPath transactions.

What is a Position in UCPath?

- In UCPath **a position is required to hire or rehire an employee.**

- A position is like a chair. Like chairs, positions can be **filled** or **vacant** and can have different people sitting in them at different times.

- UCI employees are assigned to a single headcount position (one-to-one) where a unique position number is assigned to a single employee.

- Multi-headcount positions (one-to-many) will only be used for in some instances when cross training of a new employee is conducted by the current employee in the position.

Position Management Overview

Position Management coordinates 3 components Position, Person and Job.

When an employee is hired into a position, a job is created.

Position	**Person**	**Job**
Administrative Assistant	*Employee - John Jones*	*John Jones - Administrative Assistant*

Position vs Job

Position

Position is independent of an employee.
It has a set of attributes, which are preserved even as incumbents come and go, for example:

- Department
- Job code
- FTE
- Salary Plan & Grade

Job

When the employee is hired their jobs inherits the attributes of the Position. During the hire additional information, unique to the person, is added to complete an employee's Job Record, for example:

- Employee Class
- Compensation Rate
- Additional compensation

Position Data Changes – Overview

Position Data changes in PayPath can be initiated for filled positions only and where only one employee is assigned to the position.

The **PayPath Actions** search page restricts you from accessing a position that is vacant. The system displays an error message:

"No matching values. You have entered a position number that is vacant."

Initiators can access the Position Control Request page to update to vacant positions.

Position Data Changes

When a position data change is entered, a new row with the same effective date is automatically inserted in the **Job Data** page and displays the updated position information.

- All **Job Data** fields that are controlled by **Position Data** appear as display-only.
- If needed, you can add additional **Job Data** rows (with the same effective date) to add job-related updates.

For example:

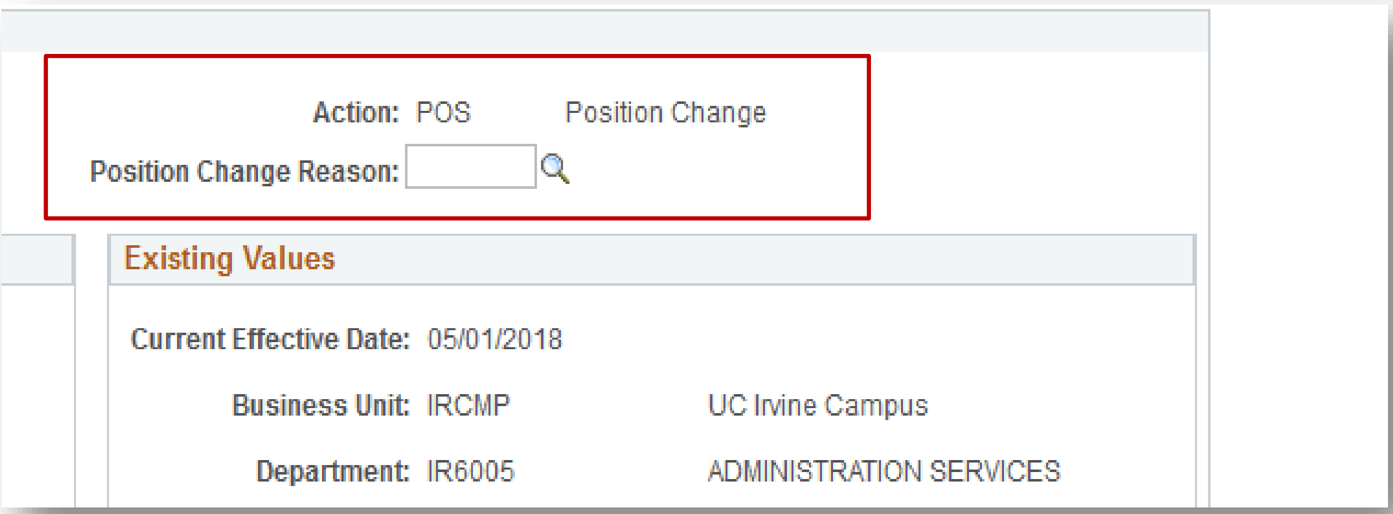
- **Position Data** change: Employee promoted to a new job code.
- **Job Data** change: Employee receives a pay rate increase.

Position Data Changes – Examples

- Position FTE changes
- FLSA Status changes
- Reports To Change
- Series Change
- Job code changes
- Position Location changes
- Union Codes
- UC Employee Relations Code

Position Data Change – Action Reason Codes

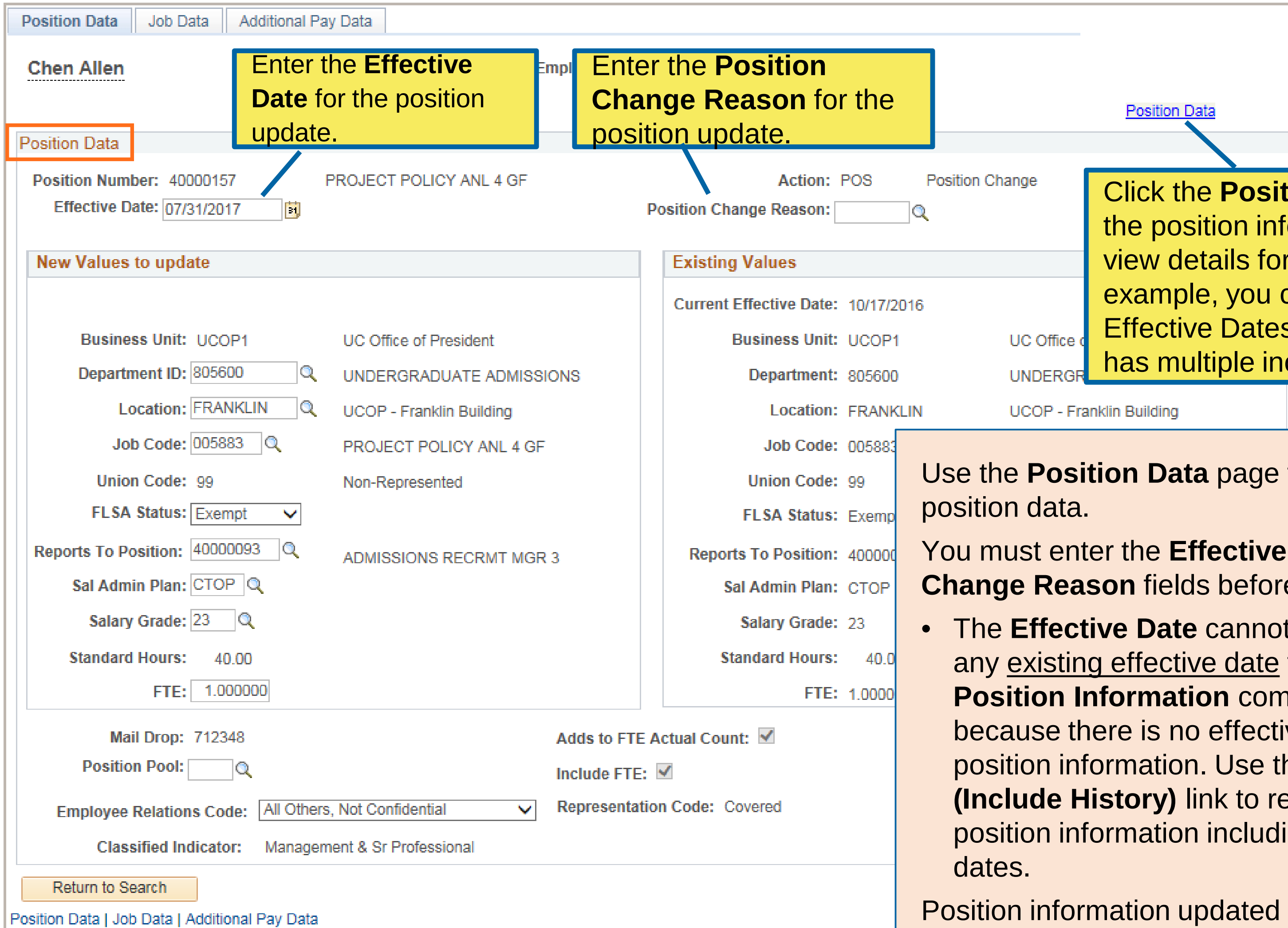
- **Action** and **Action Reason** codes further define the purpose of position data change transactions.
- For position data changes, the **Action** is always the same, **POS**. You only need to complete the **Position Change Reason**.



Position Data Change – Key System Steps

1. Navigate to the **PayPath Actions** Page
2. Review **Employee Information**
3. Update **Position Data**
4. **Save and Submit**

Position Data Page



Enter the **Effective Date** for the position update.

Enter the **Position Change Reason** for the position update.

Click the **Position Data** link to access the position information component to view details for the position. For example, you can see the position Effective Dates and also if the position has multiple incumbents.

Use the **Position Data** page to enter changes to position data.

You must enter the **Effective Date** and the **Position Change Reason** fields before entering the update.

- The **Effective Date** cannot be the same date as any existing effective date for the employee in the **Position Information** component. This is because there is no effective date sequencing for position information. Use the **Position Data (Include History)** link to review employee position information including existing effective dates.

Position information updated on this page also updates the **Job Data** page.

Position Data Effective Date

Position Data is not sequenced

- Only one position row can exist on a specific effective date
- Select the Position Data link when making historical changes to ensure that a position data row does not already exist for that date
- Only UC Path Center (UCPC) can make changes to an existing effective dated position data row

Instructor Demo

Initiate Position Data Change PayPath Transaction (Staff/Acad)

- Watch as your instructor demonstrates how to initiate a position data change PayPath transaction.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the ***Initiate Position Data Change PayPath Transaction (Staff/Acad)*** topic.
- Launch the **See It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

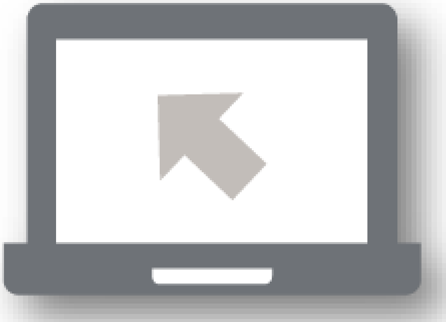
Exercise 1

Initiate Position Data Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Use your workbook to complete the **Initiate Position Data Change PayPath Transaction – Initiate Data Change**.
- Ask your instructor for assistance, if needed.

***Navigation**:*

PeopleSoft Menu
> UC Customization
> UC Extensions
> PayPath Actions



Instructor Demo

Initiate Position Data Change PayPath Transaction (Promotion/Reclassification)

- Watch as your instructor demonstrates how to initiate a position data change PayPath transaction for a promotion in UCPath.
- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Data Change PayPath Transaction (Acad Promotion)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Data Change PayPath Transaction (Staff Promotion)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise 2

Initiate Position Data Change PayPath Transaction (Promotion/Reclassification)

- This is your opportunity to practice this task on your own.
  - Use your workbook to complete the Initiate Position Data Change PayPath Transaction (Acad Promotion).
  - Use your workbook to complete the Initiate Position Data Change PayPath Transaction (Staff Promotion).
- Ask your instructor for assistance, if needed.

Navigation:

PeopleSoft Menu
> UC Customization
> UC Extensions
> PayPath Actions

Changes to Position and Job FTE

FTE can be either changed at Position or at a Job level.

1. Changing Position FTE
   - **Vacant positon** – changes to FTE for vacant positions can be done via the Position Control Form (PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request).
   - **Filled position** – changes to FTE for filled positions can be done via PayPath. Please see the UPK ‘Initiate Position Data Change PayPath Transaction (Acad FTE Change)’ or ‘Initiate Position Data Change PayPath Transaction (Staff FTE Change)’ for step by step instructions.

2. Changing Job FTE

   You can also keep the position FTE as 1.00 and only change the job FTE. This will require you to first decouple the position and job FTE so they are independent. Once decoupled the job FTE can be adjusted as needed. Please see the UPK ‘Initiate Job Data FTE Override PayPath Transaction (Staff/Acad) for step by step instruction.

Initiate Position Data Change PayPath Transaction (FTE Change)

- Watch as your instructor demonstrates how to initiate a position data change PayPath transaction for an FTE change in UCPath.
- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Data Change PayPath Transaction (Acad FTE Change)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Data Change PayPath Transaction (Staff FTE Change)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise 3

Initiate Position Data Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Use your workbook to Initiate Position Data Change PayPath Transaction (Acad FTE Change).
  - Use your workbook to Initiate Position Data Change PayPath Transaction (Staff FTE Change).

Ask your instructor for assistance, if needed.

Navigation:

PeopleSoft Menu
> UC Customization
> UC Extensions
> PayPath Actions

Lesson Objectives Review

✓ Having completed this lesson, you should be able to:

- Describe the key system steps to complete a position data change PayPath transaction.
- Initiate position data change PayPath transactions.

Knowledge Check

Position Data

- You now have the opportunity to assess your knowledge of the information presented in this lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

True or False

Position data changes in **PayPath Actions** can be initiated for vacant positions (positions not filled).

TRUE

FALSE

Next

Response Feedback

Sorry, Incorrect!

False: Position data changes in **PayPath Actions** can be initiated only for filled positions where only one employee is assigned to the position.

Continue…

Fill-In-The-Blank

- Position information that is updated on the **Position Data** page also updates the position-related information on the ___Job Data___ page.

Multiple Choice

- You must enter the following field(s) on every position data change transaction:

A. Department ID

B. Position Action Reason

C. Position Action

D. All of the above

E. None of the Above

Response Feedback

Sorry, Incorrect!

Continue…

Try Again…

Response Feedback

That is Correct!

Continue…

Lesson 3

Job Data Changes

Lesson Objectives

1: PayPath Transactions Overview

2: Position Data Changes

3 **Job Changes**

4: Additional Pay

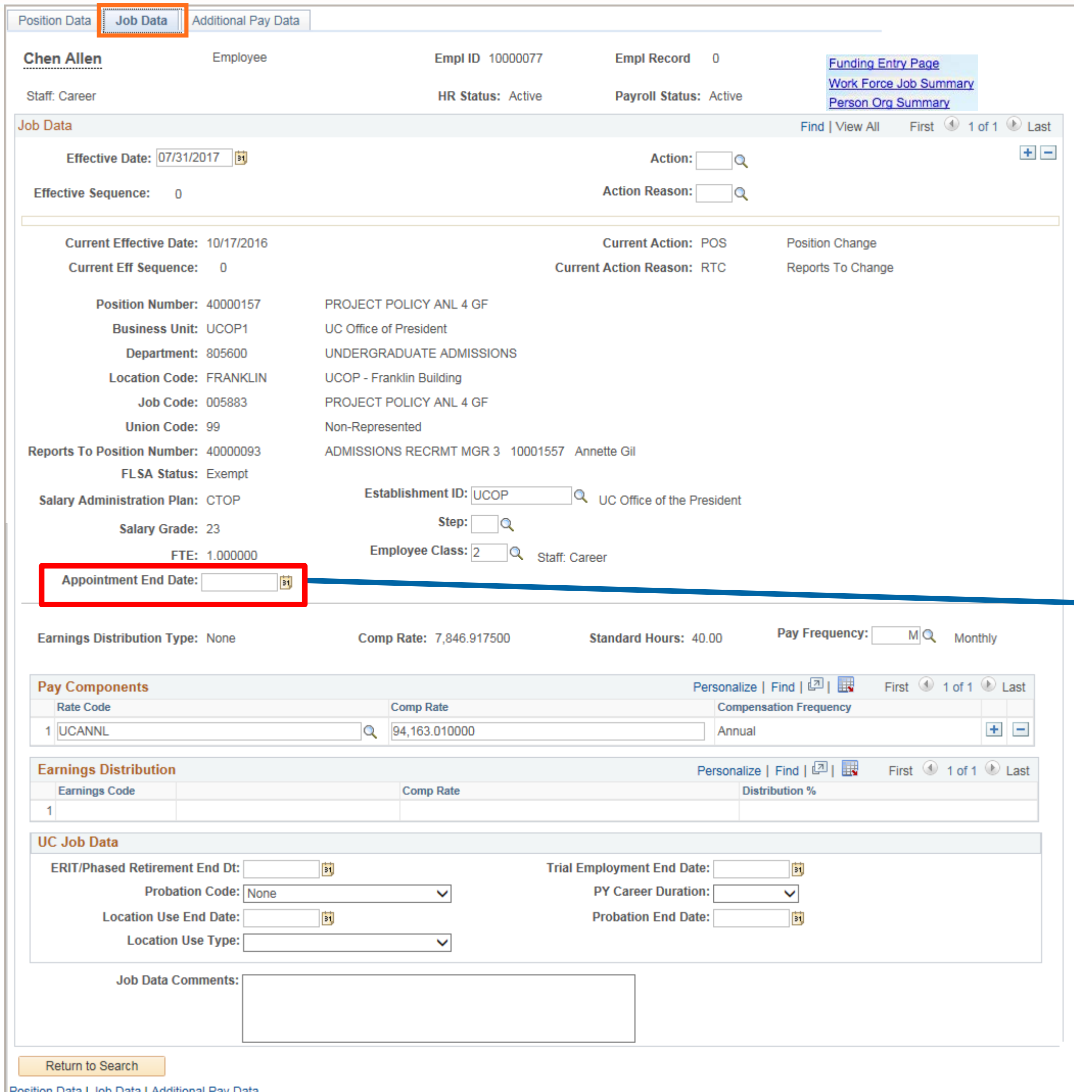
In this lesson you will learn how to:

- Describe the key system steps to complete a job data change PayPath transaction.
- Initiate a multi-row job data change PayPath transaction.
- Initiate a pay rate change PayPath transaction.
- Initiate job earnings distribution PayPath transactions.
- Initiate short work break PayPath transactions.

Job Data Changes – Overview

- The **Job Data** page is used for many types of job-related updates, which can be made independent of a position change.
  - However, if a position change is made, PayPath automatically updates the **Job Data** page to display the new position data.
- Some of the **Job Data** page fields and values display differently for academics than they do for staff. For example:
  - The End Job Automatically flag, Academic Duration Appointment, and Post Doctoral Anniversary Date fields are applicable only to academics.
  - Probation Code, Probation End Date, Trial Employment End Date, Partial Year Career Duration are applicable only to staff.

Job Data Page – Staff Example



This is an example of the staff version of the **Job Data** page. The staff and academic versions are very similar; however, each version includes some fields and data that is relevant to either academic or staff employees.

For example, for staff:

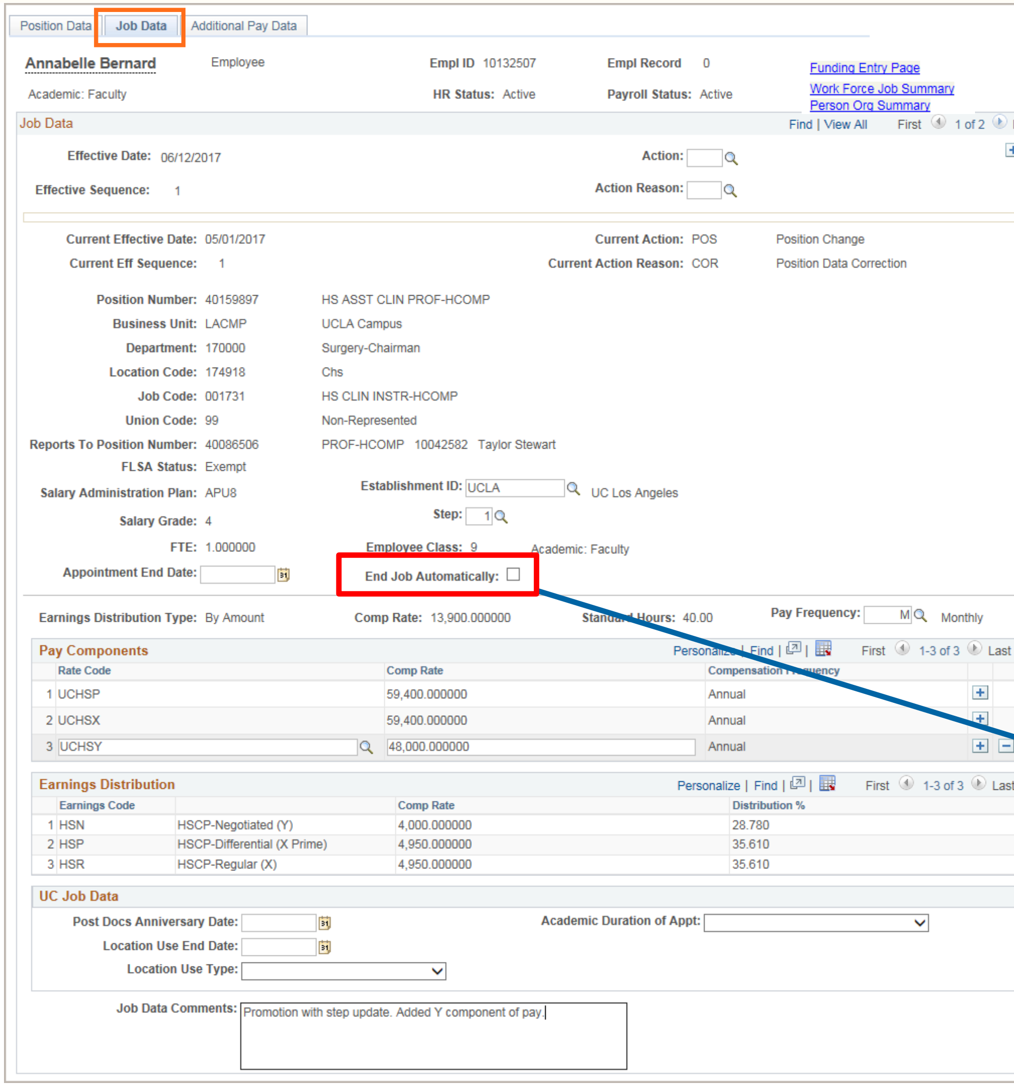
- The data values available in the **Action** and **Action Reason** fields are specific to staff.
- The **Employee Class** field can be edited.
- The fields in the **UC Job Data** section are specific to staff.

If the employment is a short-term assignment or temporary hire, the date the position ends appears in the **Appointment End Date** field.

- Non-Academic employees are automatically terminated in UCPath on this date.

Locations monitor expected job/appointment end dates and, if needed, update/extend the **Appointment End Date** to ensure the termination does not occur.

Job Data Page – Academic Example



The **academic version** of the **Job Data** page is similar to the staff version, but there are some differences.

For example, for academics:

The data values available in the Action and Action Reason fields are specific to academics.

- The **Employee Class** defaults and cannot be edited.
- The functionality of **Pay Components and Earnings Distribution** supports academic pay calculations.
- The fields in the UC Job Data section are specific to academics.

For Academic employees, the **End Job Automatically** check box also appears. This check box must be selected to automatically terminate the academic employee on the **Expected Job End Date**.

Appointment End Date

There are important factors to consider about appointment end dates.

- Academic appointment end dates will not stop payroll.
  - An employee will continue to get paid after their appointment end date and will continue to do so until they are terminated, the **End Job Automatically** box in Job Data is checked, or the employee is placed on a Short Work Break.
- Staff appointments with end dates will auto-terminate. A final pay transaction may need to be processed to pay out any accruals.
- Changes cannot be made on appointments with expired end dates.
  - Any changes will require a reinstatement of their job.

Multiple Job Data Changes

PayPath can accommodate **multiple** job data changes in a single transaction:

- The multiple job data changes must be the same **effective date**.
- Enter the rows in sequential order, or the order in which they occur.
  1) **Seq. 0** is the first update, then add a row.
  2) **Seq. 1** is the next update, then add a row.
  3) **Seq. 2** is the next update, and so forth.
- The sequence number is automatically populated when you add a row in **PayPath Actions**.
- Effective date sequencing is especially important when compensation is involved.

Action	Effective Date	Effective Seq.	Notes
Position Promotion	3/1/2016	0	Position Data change automatically inserts the first row in Job Data.
Pay Rate Change / Promotion	3/1/2016	1	Second row added by user.
Pay Rate Change / Equity	3/1/2016	2	Third row added by user.

Instructor Demo

Initiate Multi-Row Job Data Change PayPath Transaction

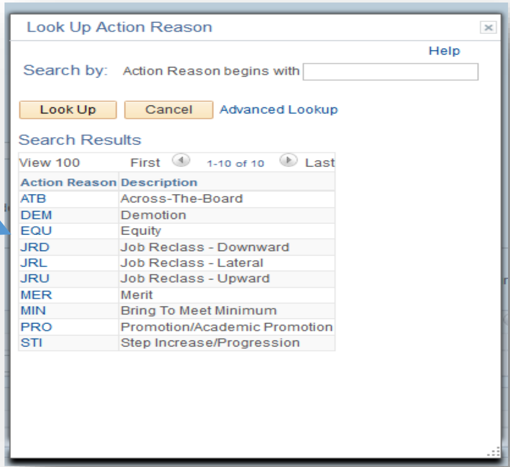
- Watch as your instructor demonstrates how to initiate multiple job data changes in a single PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the ***Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)*** topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Job Data Change – Action Reason Codes

- **Action** and **Action Reason** codes further define the purpose of job data change transactions.
- The **Action** and the **Action Reason** fields are required.
- The values available in the **Action Reason** field are dependent on the selection made in the **Action** field.
- Examples of Action/Action Reason include:

Action: PAY

Action Reasons:


Look Up Action Reason

Help

Search by: Action Reason begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-10 of 10 Last

Action Reason	Description
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
STI	Step Increase/Progression

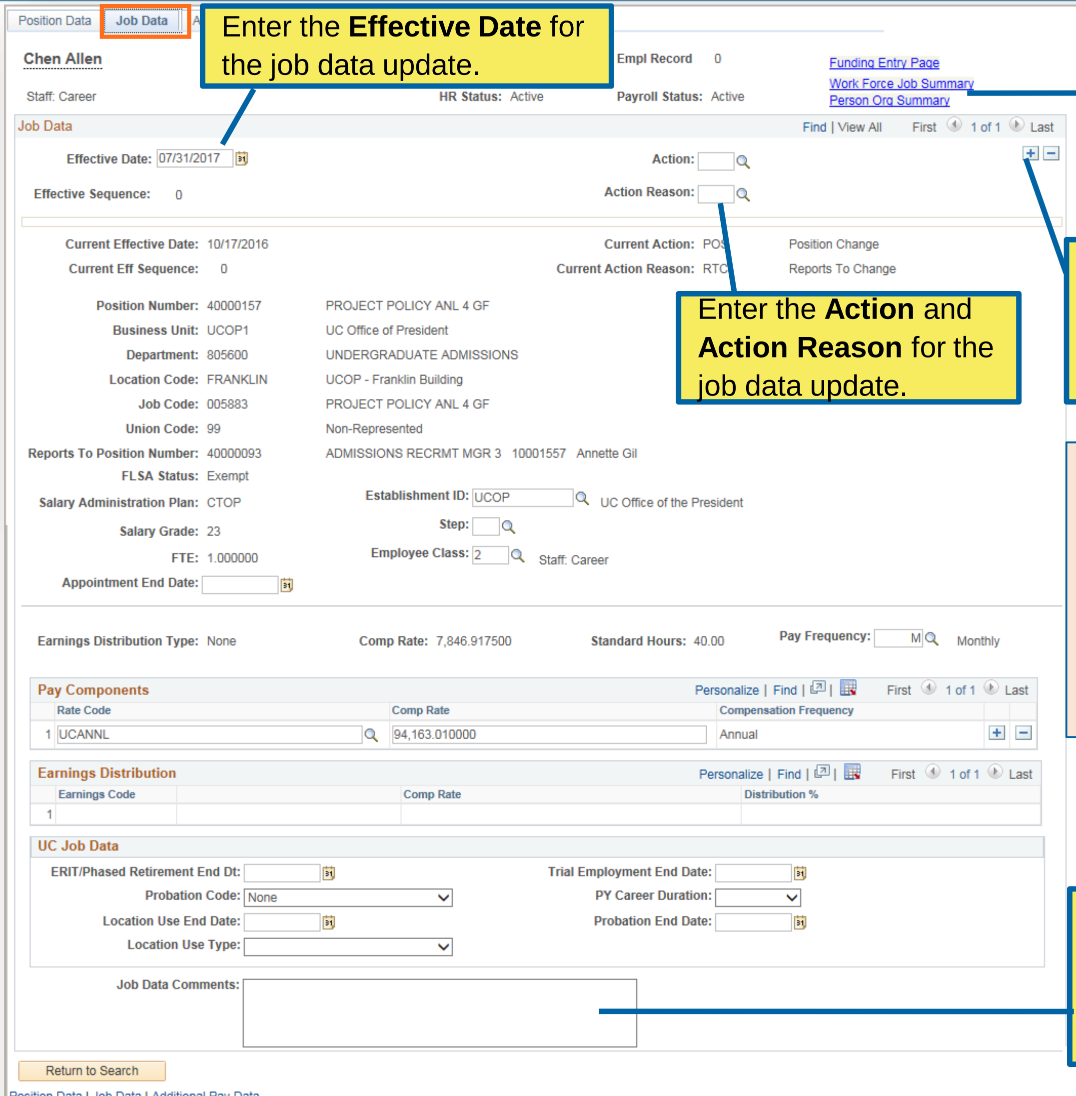
PayPath Transactions – Action Codes, Reason Codes and Descriptions

- This is your opportunity to review the job aid.
  - **Academic**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.
- Ask your instructor for assistance.

Job Data Change – Key System Steps

1. Navigate to the **PayPath Actions** Page
2. Review **Employee Information**
3. Enter **Job Data** update
4. **Save and Submit**

Job Data Page – Data Entry



Enter the **Effective Date** for the job data update.

To review all job data rows for the employee (single employee assignment), click the **Work Force Job Summary** link. To review all current assignments (multiple employee assignments), click the **Person Org Summary** link. Review the current funding using the **Funding Entry Page** .

Enter the **Action** and **Action Reason** for the job data update.

Click **+** to add multiple job data changes in the same transaction. Multiple changes can be entered only for the same **Effective Date**.

Use the **Job Data** page to enter updates to job-related data such as pay, earnings distribution and short work break.

You must enter the **Effective Date** and the **Action** and **Action Reason** fields before entering an update.

Use the PayPath **Job Data Comments** to record details about the position and/or job changes. This note is stored directly in the notes feature of the **Job Data** component for the employee.

Job Data – Change Types

There are many types of **Job Data** changes, most of which fall into the first three categories.

- **Data**
- **Pay Rate**
- **Job Earnings Distribution (JED)**
- **Short Work Break**

Change Type – Data

Data

Examples of data changes requested through PayPath include:

- Extension of Appointment End Date
- Extension of Location Use End Date
- Academic Reappointment
- Change from Limited to Career Status and Change of Employee Class (Staff Only)
- Update to Probation Code and/or Probation Date (Staff Only)

Change Type – Pay Change

Pay Rate

Pay Rate changes update the rate of pay for Staff or Academic employees.

Examples of pay changes requested through PayPath include:

- Change to rate of pay for staff or academic
  - Merit
  - Equity increases
  - Changes to negotiated salaries
  - Adjustments to off-scale salary amounts
  - Step increase progression
- Pay components (for example, X, X' or Annual Salary) automatically populate based on selection of a salary step.

Instructor Demo

Initiate Pay Rate Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a pay rate change PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise 4

Initiate Pay Rate Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Use your workbook to complete the *Initiate Pay Rate Change PayPath Transaction (Acad)*.
  - **Staff**: Use your workbook to complete the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic
- Ask your instructor for assistance.

Change Type – Job Earnings Distribution

Job Earnings Distribution (JED)

The **Job Earnings Distribution (JED)** is primarily used to distribute earnings by earn codes either by percentage or by amount for Exempt employees as it controls how much they are paid when an adjustment to their FTE is not applicable.

Non-Exempt employees' pay is generated based on their hours submitted in Time and Attendance.

Examples of JED changes requested through PayPath include:

- Employee Reduction in Time (ERIT)
- HSCP-related automated JED by Earn Code
- NSTP-Negotiated Salary Trial Program

Initiate Job Earnings Distribution PayPath Transaction

- Watch as your instructor demonstrates how to initiate a job earnings distribution PayPath transaction in UCPath.
- Follow along using the UPK topic.
    - **Academic**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Acad)* topic.
    - **Staff**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Initiate Return to Normal (JED) Distribution PayPath Transaction

- Watch as your instructor demonstrates how to initiate a return to normal (JED) distribution PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the *Initiate Return to Normal (JED) Distribution PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Change Type – Short Work Break

Short Work Break

The **UCPath Short Work Break (SWB)** process refers to placing an employee on, or returning them from, a short work break. Refer to the Short Work Break Matrix Job Aid for durations allowed.

- The action of SWB can be used to stop pay for an employee in the system for a temporary period of time and moves them to a ‘work break’ status.
- It avoids the process and time involved in terminating and rehiring someone who will be gone for a short period of time
- This process applies to both staff and academic employees.
- While on SWB, the employee may not receive any pay for the job on SWB, however they may be eligible to continue certain benefits. It will also trigger Benefits Billing, if necessary. See UCI Business Process Guide (WFA.13) for more information.

Change Type – Short Work Break (cont.)

Short Work Break

- Employee's on SWB are monitored at locations on a regular basis. The UCPath Center is responsible for monitoring the Short Work Break Audit Report and works with Locations to confirm the appropriate course of action regarding the employee on SWB.
- The length of time allowed for a short work break depends on the type of position/ employee class. See the next two slides for more information and examples.
- SWB is assigned per job. It is possible for an employee to be on SWB for one job but not for other job or jobs.

Short Work Break – Academic Examples

Type	Description
Academic Students	Used to put academic students off pay status over the summer or in between quarters/semesters. Limited to 4 consecutive months.
Unit 18- Benefits Bridge Eligible	Used to put a Unit 18 employee off pay status in between quarters/ semesters of active employment. The employee is eligible to request a Benefits Bridge. Limited to 3 consecutive months.
Unit 18- Benefits Bridge Not Eligible	Used to put a Unit 18 employee off pay status in between quarters/ semesters of active employment. The employee is not eligible to request a Benefits Bridge. Limited to 12 consecutive months.
University Extension (UNEX)	Used to put a UNEX Teacher off pay status in between periods of active employment. Limited to 6 consecutive months.
Variable Appointment	Used to put an exempt academic employee with a highly variable schedule off pay status in between periods of active employment. Limited to 12 consecutive months.
Research Funding Bridge	Used to place an employee that is awaiting research funding on SWB. Limited to 4 consecutive months.

Short Work Break – Staff Examples

Type	Description
Partial-Year Career Furlough	Used to place a partial-year career employee on furlough. **Action Reason** selection is based on the number of working months the partial-year career employee is scheduled to work: 9, 10 or 11 months. See **Job Aid: Short Work Break Matrix** for more detail.
Floaters	Used for floater employees during periods of inactivity. See **Job Aid: Short Work Break Matrix** for more detail.
Limited Employees	Used for limited employees off pay status. Limited to 4 consecutive months.
Undergraduate Students	Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters/ semesters. Limited to 4 consecutive months.

Short Work Break Matrix

- Open the UCPath Help site and refer to the ***Short Work Break Matrix*** topic.
- This matrix provides guidance for when and how to use a Short Work Break.

Instructor Demo

Initiate Short Work Break PayPath Transaction

- Watch as your instructor demonstrates how to initiate a short work break PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the ***Initiate Short Work Break PayPath Transaction (Staff/Acad)*** topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Instructor Demo

Initiate Return from Short Work Break PayPath Transaction

- Watch as your instructor demonstrates how to initiate a return from short work break PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the ***Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)*** topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Lesson Objectives Review

Having completed this lesson, you should now be able to:

- Describe the key system steps to complete a job data change PayPath transaction.
- Initiate a multi-row job data change PayPath transaction.
- Initiate a pay rate change PayPath transaction.
- Initiate job earnings distribution PayPath transactions.
- Initiate short work break PayPath transactions.

Knowledge Check

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this esson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

True or False

For multiple **Job Data** updates, enter the rows of data in sequential order, or the order in which they should occur.

TRUE

FALSE

Next

Response Feedback

Sorry, Incorrect!

Correct Answer: TRUE

Continue…

Multiple Choice

- Types of **Job Data** changes that can be initiated in **PayPath Actions** include:

A. Job Data, Short Work Break, Leave of Absence

B. Pay Rate, Job Data, Termination

C. Job Data, Pay Rate, Job Earnings Distribution

D. All of the Above

Response Feedback

Sorry, Incorrect!

Continue…   Try Again…

Response Feedback

That is Correct!

Continue…

Fill-In-The-Blank

- You must enter values in the ___Effective Date___, **Action** and **Action Reason** fields before entering a **Job Data** update.

Lesson 4

Additional Pay

Lesson Objectives

1: PayPath Transactions Overview

2: Position Data Changes

3: Job Changes

4 Additional Pay

In this lesson you will learn how to:

- Describe the key systems steps to complete an additional pay PayPath transaction.
- Initiate additional pay PayPath transaction.
- Initiate update to additional pay PayPath transaction.
- Initiate retroactive additional pay PayPath transaction.

Additional Pay – Overview

- **Additional Pay** is any compensation above a University employee's regular, base compensation.
- There are two types of additional pay transactions:

+1 ***<u>One-time</u>* – applies to a single pay cycle or non-consecutive pay cycles.**	***<u>Recurring</u>* – payments are paid over multiple, consecutive pay periods**

Additional pay transactions entered in PayPath are routed for approvals and then transferred to a Payroll staging table to be processed automatically by UCPC Payroll additional pay batch upload process.

Additional Pay – Overview (cont'd)

- Additional pay must be entered as a flat per pay period amount (monthly or bi-weekly)
  - All prorated payments should be calculated prior to entering the flat amount.
  - **The Prorate check box is not functioning in UCPath at this time**.
- When an employee is hired and the Hire Template transaction has been submitted for approval, the employee is not available in PayPath until the Hire Template has been approved and processed by UCPC WFA Production.
  - After the employee is available in PayPath, the employee's additional pay data cannot be updated until the Payroll nightly process has assigned the employee's pay group.

Additional Pay Files

- Additional pay files are processed during on-cycle payrolls only.
  - Refer to the **UCPath Production Processing Schedule** for deadlines.
  - When additional pay transactions are entered into UCPath, the AWE approval process must be completed before UCPath sends the files to payroll processing.
  - Allow sufficient time to get the transactions through the approval process so they can be processed in the next on-cycle.
  - Submitted transactions are attached to a specific run ID. If the approved transaction is past the due date, the request will be cancelled and must be resubmitted by the Location.
- Additional Pay transactions can be continuously submitted. The UCPath Center batches these transactions every morning so they are available to view in staging the next day.
  - This means that the Locations can see the status of a transaction one business day after submission, even if it is days or weeks before the specific payroll begins.

Timing and Deadlines

The UCPath Production Processing Schedule is used to reference when tasks performed by locations and/or the UCPath Center teams are needed to complete a payroll. This schedule will be standard across all locations.*

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedul	Location						UCPath Center				
							Campus		Med Center Only						
		Begin	End		• PayPath • Mass Hire • HR template • Leave Transaction (3pm) • Retro Pay (4pm)	• I-156: FICA (3pm)	• Inbound Files Due*** (2:30pm) • Msg Error Log Distribution (5pm)	• Location Corrections To Msg Error Log (2pm) • E-703 Funding Upload	• Inbound Files Due **** (4am) • Msg Error Log Distribution (8am)	• Location Corrections To Msg Error Lo (2pm)	Pay Confirm	AM Post Confirm	GL Post Confirm	Pay Statements on UCPath	Leave Accrual Available on UCPath (After 5pm)
MO	Mon 07-01-19	06-01-19	06-30-19	190630M0X	Wed 06-19-19	Thu 06-20-19	Thu 06-20-19	Fri 06-21-19	Thu 06-20-19	Fri 06-21-19	Tue 06-25-19	Mon 07-01-19	Thu 06-27-19	Sat 06-29-19	Mon 07-01-19
B1	Wed 07-10-19	06-16-19	06-29-19	190629B1X	Fri 06-28-19	Mon 07-01-19	Tue 07-02-19	Wed 07-03-19	Wed 07-03-19	Wed 07-03-19	Fri 07-05-19 *	Mon 07-08-19 *	Tue 07-09-19 *	Mon 07-08-19	Tue 07-09-19
B2	Wed 07-24-19	06-30-19	07-13-19	190713B2X	Fri 07-12-19	Mon 07-15-19	Tue 07-16-19	Wed 07-17-19	Wed 07-17-19	Wed 07-17-19	Thu 07-18-19	Mon 07-22-19	Mon 07-22-19	Mon 07-22-19	
MO	Thu 08-01-19	07-01-19	07-31-19	190731M0X	Mon 07-22-19	Tue 07-23-19	Tue 07-23-19	Wed 07-24-19	Tue 07-23-19	Wed 07-24-19	Fri 07-26-19	Thu 08-01-19	Tue 07-30-19	Tue 07-30-19	Thu 08-01-19
B1	Wed 08-07-19	07-14-19	07-27-19	190727B1X	Fri 07-26-19	Mon 07-29-19	Tue 07-30-19	Wed 07-31-19	Wed 07-31-19	Wed 07-31-19	Thu 08-01-19	Mon 08-05-19	Mon 08-05-19	Mon 08-05-19	Mon 08-05-19
B2	Wed 08-21-19	07-28-19	08-10-19	190810B2X	Fri 08-09-19	Mon 08-12-19	Tue 08-13-19	Wed 08-14-19	Wed 08-14-19	Wed 08-14-19	Thu 08-15-19	Mon 08-19-19	Mon 08-19-19	Mon 08-19-19	
MO	Fri 08-30-19	08-01-19	08-31-19	190831M0X	Tue 08-20-19	Wed 08-21-19	Wed 08-21-19	Thu 08-22-19	Wed 08-21-19	Thu 08-22-19	Mon 08-26-19	Mon 09-02-19	Wed 08-28-19	Wed 08-28-19	Tue 09-03-19
B1	Wed 09-04-19	08-11-19	08-24-19	190824B1X	Fri 08-23-19	Mon 08-26-19	Tue 08-27-19	Wed 08-28-19	Wed 08-28-19	Wed 08-28-19	Thu 08-29-19	Tue 09-03-19	Mon 09-02-19	Mon 09-02-19	Tue 09-03-19
B2	Wed 09-18-19	08-25-19	09-07-19	190907B2X	Fri 09-06-19	Mon 09-09-19	Tue 09-10-19	Wed 09-11-19	Wed 09-11-19	Wed 09-11-19	Thu 09-12-19	Mon 09-16-19	Mon 09-16-19	Mon 09-16-19	
MO	Tue 10-01-19	09-01-19	09-30-19	190930M0X	Thu 09-19-19	Fri 09-20-19	Fri 09-20-19	Mon 09-23-19	Fri 09-20-19	Mon 09-23-19	Wed 09-25-19	Tue 10-01-19	Fri 09-27-19	Sun 09-29-19	Tue 10-01-19
B1	Wed 10-02-19	09-08-19	09-21-19	190921B1X	Fri 09-20-19	Mon 09-23-19	Tue 09-24-19	Wed 09-25-19	Wed 09-25-19	Wed 09-25-19	Thu 09-26-19	Mon 09-30-19	Mon 09-30-19	Mon 09-30-19	Mon 09-30-19
B2	Wed 10-16-19	09-22-19	10-05-19	191005B2X	Fri 10-04-19	Mon 10-07-19	Tue 10-08-19	Wed 10-09-19	Wed 10-09-19	Wed 10-09-19	Thu 10-10-19	Mon 10-14-19	Mon 10-14-19	Mon 10-14-19	
B3	Wed 10-30-19	10-06-19	10-19-19	191019B3X	Fri 10-18-19	Mon 10-21-19	Tue 10-22-19	Wed 10-23-19	Wed 10-23-19	Wed 10-23-19	Thu 10-24-19	Mon 10-28-19	Mon 10-28-19	Mon 10-28-19	Mon 10-28-19
MO	Fri 11-01-19	10-01-19	10-31-19	191031M0X	Tue 10-22-19	Wed 10-23-19	Wed 10-23-19	Thu 10-24-19	Wed 10-23-19	Thu 10-24-19	Mon 10-28-19	Fri 11-01-19	Wed 10-30-19	Wed 10-30-19	Fri 11-01-19
B1	Wed 11-13-19	10-20-19	11-02-19	191102B1X	Fri 11-01-19	Mon 11-04-19	Tue 11-05-19	Wed 11-06-19	Wed 11-06-19	Wed 11-06-19	Thu 11-07-19	Tue 11-12-19	Tue 11-12-19	Mon 11-11-19	
B2	Wed 11-27-19	11-03-19	11-16-19	191116B2X	Fri 11-15-19	Mon 11-18-19	Tue 11-19-19	Wed 11-20-19	Wed 11-20-19	Wed 11-20-19	Thu 11-21-19	Mon 11-25-19	Mon 11-25-19	Mon 11-25-19	Mon 11-25-19
MO	Wed 11-27-19	11-01-19	11-30-19	191130M0X	Fri 11-15-19 *	Mon 11-18-19 *	Mon 11-18-19	Tue 11-19-19	Mon 11-18-19 ®®	Tue 11-19-19	Fri 11-22-19 *	Mon 12-02-19 *	Tue 11-26-19 *	Mon 11-25-19 *	Mon 12-02-19
B1	Wed 12-11-19	11-17-19	11-30-19	191130B1X	Wed 11-27-19 *	Mon 12-02-19 *	Tue 12-03-19	Wed 12-04-19	Wed 12-04-19	Wed 12-04-19	Thu 12-05-19	Mon 12-09-19	Mon 12-09-19	Mon 12-09-19	
B2	Mon 12-23-19	12-01-19	12-14-19	191214B2X	Thu 12-12-19 *	Fri 12-13-19 *	Mon 12-16-19 *	Tue 12-17-19 *	Tue 12-17-19 *	Tue 12-17-19 *	Wed 12-18-19 *	Mon 12-23-19 *	Fri 12-20-19 *	Thu 12-19-19 *	Mon 12-23-19
MO	Thu 01-02-20	12-01-19	12-31-19	191231M0X	Thu 12-19-19	Fri 12-20-19	Fri 12-20-19	Mon 12-23-19	Fri 12-20-19	Mon 12-23-19	Fri 12-27-19	Thu 01-02-20	Mon 12-30-19	Mon 12-30-19	Thu 01-02-20
B1	Wed 01-08-20	12-15-19	12-28-19	191228B1X	Thu 12-26-19 *	Fri 12-27-19 *	Mon 12-30-19 *	Thu 01-02-20 *	Thu 01-02-20 *	Thu 01-02-20 *	Fri 01-03-20 *	Mon 01-06-20 *	Tue 01-07-20 *	Mon 01-06-20	

*** Dates adjusted due to holiday payroll processing.**

**** Indicates 10am deadline.**

® Included in nightly batch

®® Indicates 5pm deadline.

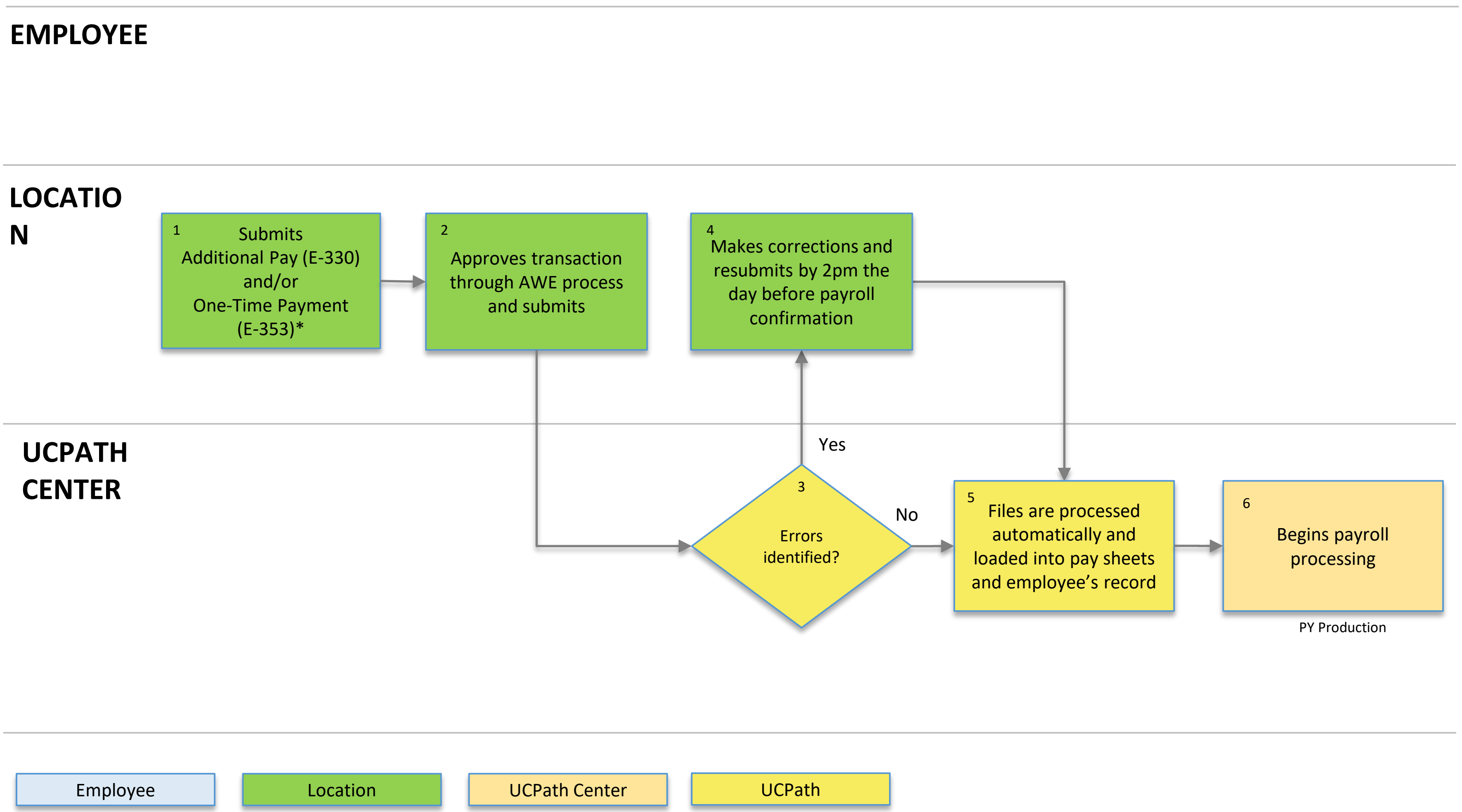
Note: Direct Retro process (aka Salary Cost Transfer) runs daily except the scheduled Payroll Confirm and GL Post Confirm dates.

*** Inbound Files - Description		Observed Holidays				Benefit Holiday	
E-084: Manage Accurals	E-353: Batch Load One-Time Payments	Monday, December 24, 2018	Winter Holiday	Thursday, July 4, 2019	Independence Day	Run ID	Check Date
E-330: Batch Load Additional Pay	I-171: Reocurring General Deductions	Tuesday, December 25, 2018	Winter Holiday	Monday, September 2, 2019	Labor Day	190518B3X	05-29-2019
I-160: Tuition Reimbursement	I-178: Parking Deductions Corrections	Monday, December 31, 2018	New Year Holiday	Monday, November 11, 2019	Veterans Day	191019B3X	10-30-2019
I-176: Parking Deductions	I-378: One Time General Deductions	Tuesday, January 1, 2019	New Year Holiday	Thursday, November 28, 2019	Thanksgiving Day		
I-181: Regular Time Entry	I-618: Flat Dollar Amount.	Monday, January 21, 2019	Martin Luther King, Jr. Day	Friday, November 29, 2019	Friday following Thanksgiving Day		
		Monday, February 18, 2019	Presidents Day	Tuesday, December 24, 2019	Winter Holiday		
		Friday, March 29, 2019	Cesar Chavez Day	Wednesday, December 25, 2019	Winter Holiday		
		Monday, May 27, 2019	Memorial Day	Tuesday, December 31, 2019	New Year Holiday		

The UCPath Payroll Processing Schedule is stored on UCPath online. To access it, navigate to: Quick links -> Payroll Calendars for MO or BW and Schedules

**Deadlines for time & attendance or pay file processing for Medical Centers may differ from deadlines for other UC locations.*

UCPath Process Overview – Additional Pay



Additional Pay – Key System Steps

Navigate to the **PayPath Actions** Page

Review **Employee Information**

Enter **Additional Pay**

Save and Submit

Additional Pay Earn Codes

There are several **earn codes** available to identify the type of additional pay. The list of additional pay **earn codes** available is based on the earnings program tied to the employee's paygroup.

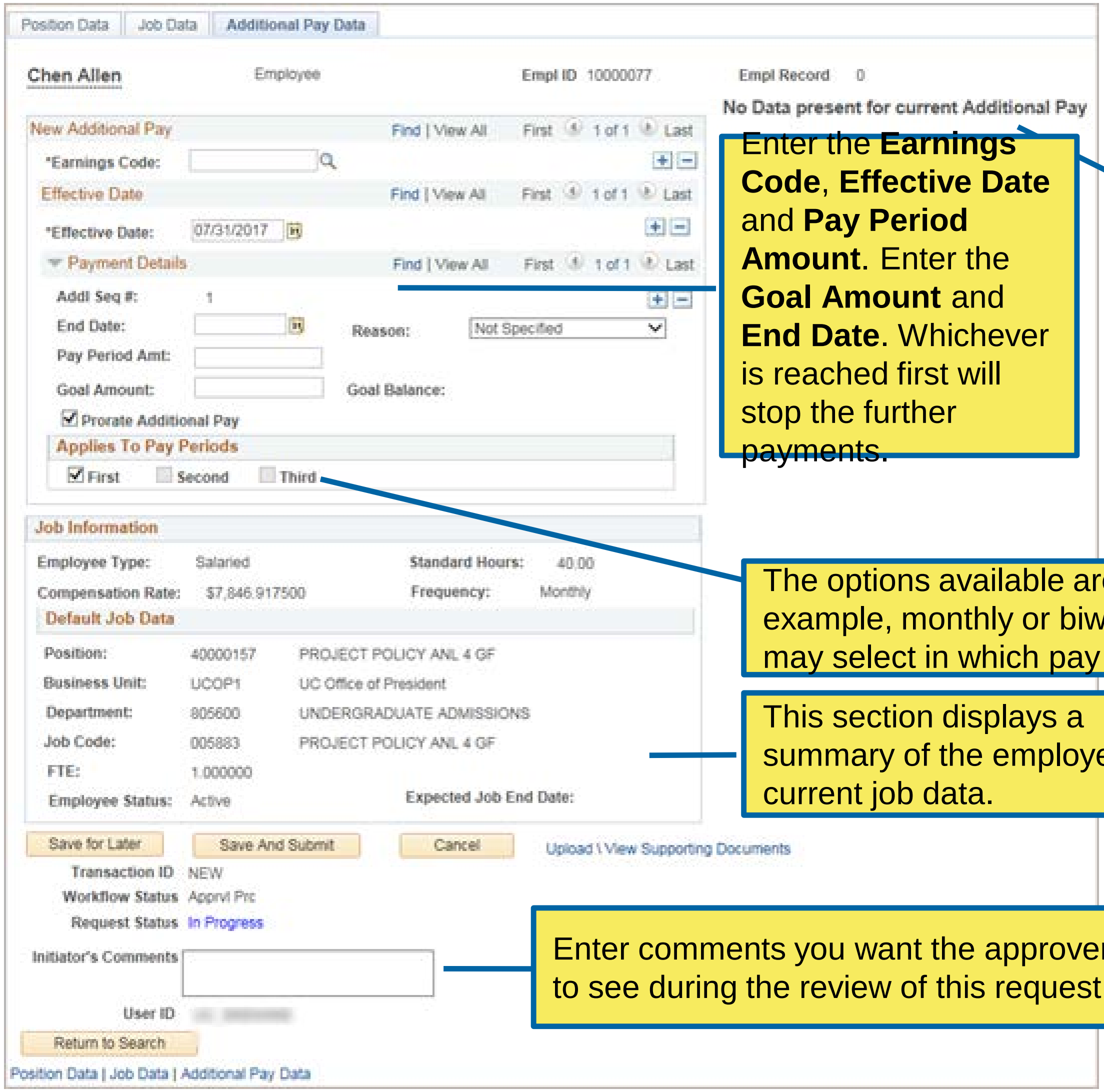
Staff Examples

Former PPS DOS Code	UCPath Earn Code	Description
AWD, PAA, SMA, IA8	AWD	Incentive Award
BON	BON	Bonus
CPC, CPG, CDF, FFO, SPC	CRT	Certification Pay
SAS, STI, SUP	SAS	Stipend-Admin-Staff
XSL, SPT, SPA, LAP, LEA, NDL, SAL	XSL	Star Award Local
XUI, MPP, BOP	XUI	UC Incentive Program

Academic Examples

Former PPS DOS Code	UCPath Earn Code	Description
FAP, LAA	AAP	Academic Award Program
AWD, PAA, SMA, IA8	AWD	Incentive Award
DIF, SMD, SMR	DIF	Summer Differential
FHA, AHA	FRA	Faculty Recruitment Allowance
HON	HON	Honorarium
AWD, BNX, IAP, EIA, LSI, MIA, TIA, TIL, BWP UIA, NRP	ICP	Incentive Pay
PTP, PTH, PIT	PTP	Post Doc PTO Adjustment

Additional Pay Data Page



Use the **PayPath Actions Additional Pay Data** page to enter specific information about the payment.

Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount**. Enter the **Goal Amount** and **End Date**. Whichever is reached first will stop the further payments.

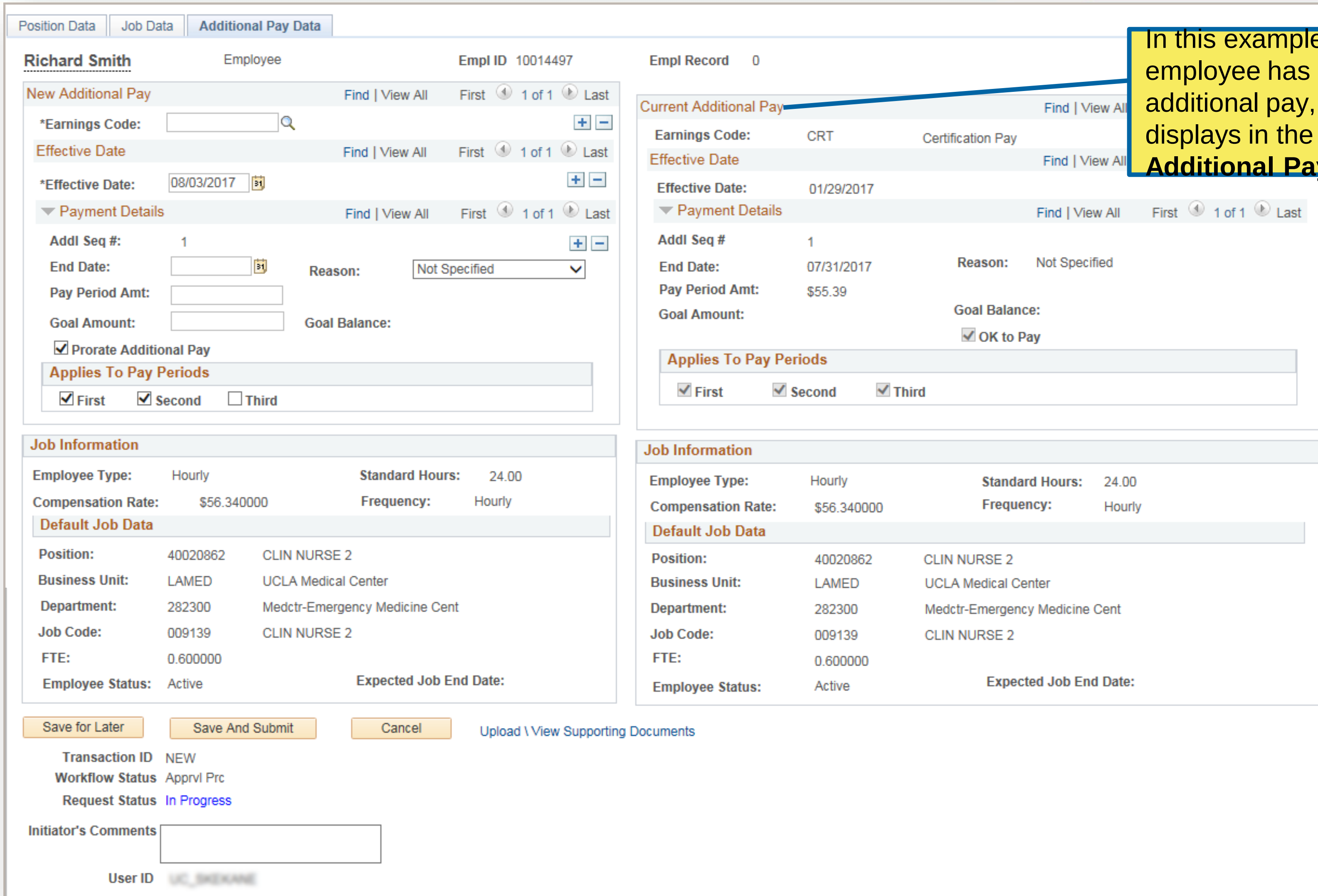
If the employee has existing additional pay, it displays in the **Current Additional Pay** section. *In this example, the employee does not have existing additional pay set up*.

The options available are based on the employee's pay cycle (for example, monthly or biweekly). For biweekly employees, you may select in which pay periods the amount should be paid.

This section displays a summary of the employee's current job data.

Enter comments you want the approver to see during the review of this request.

View Current Additional Pay


Position Data | Job Data | Additional Pay Data

Richard Smith   Employee   Empl ID 10014497   Empl Record 0

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

*Earnings Code:

Effective Date   Find | View All   First 1 of 1 Last

*Effective Date: 08/03/2017

Payment Details   Find | View All   First 1 of 1 Last

Addl Seq #: 1

End Date: Reason: Not Specified

Pay Period Amt:

Goal Amount: Goal Balance:

☑ Prorate Additional Pay

Applies To Pay Periods

☑ First ☑ Second ☐ Third

Current Additional Pay   Find | View All

Earnings Code: CRT   Certification Pay

Effective Date   Find | View All

Effective Date: 01/29/2017

Payment Details   Find | View All   First 1 of 1 Last

Addl Seq # 1

End Date: 07/31/2017   Reason: Not Specified

Pay Period Amt: $55.39

Goal Amount: Goal Balance:

☑ OK to Pay

Applies To Pay Periods

☑ First ☑ Second ☑ Third

Job Information

Employee Type: Hourly   Standard Hours: 24.00

Compensation Rate: $56.340000   Frequency: Hourly

Default Job Data

Position: 40020862   CLIN NURSE 2

Business Unit: LAMED   UCLA Medical Center

Department: 282300   Medctr-Emergency Medicine Cent

Job Code: 009139   CLIN NURSE 2

FTE: 0.600000

Employee Status: Active   Expected Job End Date:

Job Information

Employee Type: Hourly   Standard Hours: 24.00

Compensation Rate: $56.340000   Frequency: Hourly

Default Job Data

Position: 40020862   CLIN NURSE 2

Business Unit: LAMED   UCLA Medical Center

Department: 282300   Medctr-Emergency Medicine Cent

Job Code: 009139   CLIN NURSE 2

FTE: 0.600000

Employee Status: Active   Expected Job End Date:

Save for Later | Save And Submit | Cancel | Upload \ View Supporting Documents

Transaction ID NEW

Workflow Status Apprvl Prc

Request Status In Progress

Initiator's Comments

User ID

In this example, the employee has existing additional pay, which displays in the **Current Additional Pay** section.

Instructor Demo

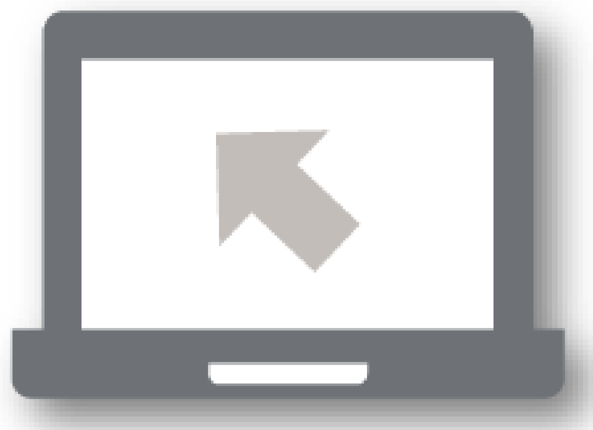
Initiate Additional Pay PayPath Transaction (Staff/Acad)

- Watch as your instructor demonstrates how to initiate an additional pay PayPath transaction in UCPath.
- Follow along using the UCPath topic.
    - Open the UCPath Help site and refer to the *Initiate Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.

Exercise 5

Initiate Additional Pay PayPath Transaction (Staff/Acad)

- This is your opportunity to practice this task on your own.
  - Use your workbook to complete the *Initiate Additional Pay PayPath Transaction (Staff/Acad)*
- Ask your instructor for assistance..

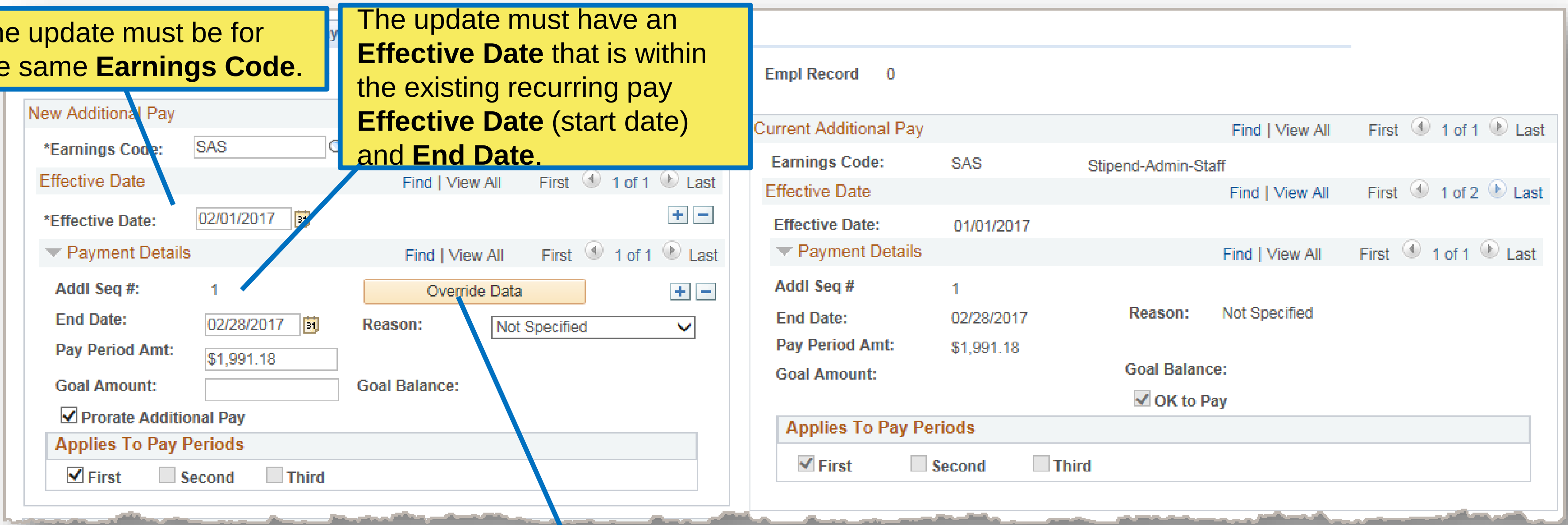


Update Additional Pay

Updates can be made to existing recurring additional pay transactions.

The update must be for the same **Earnings Code**.

The update must have an **Effective Date** that is within the existing recurring pay **Effective Date** (start date) and **End Date**.



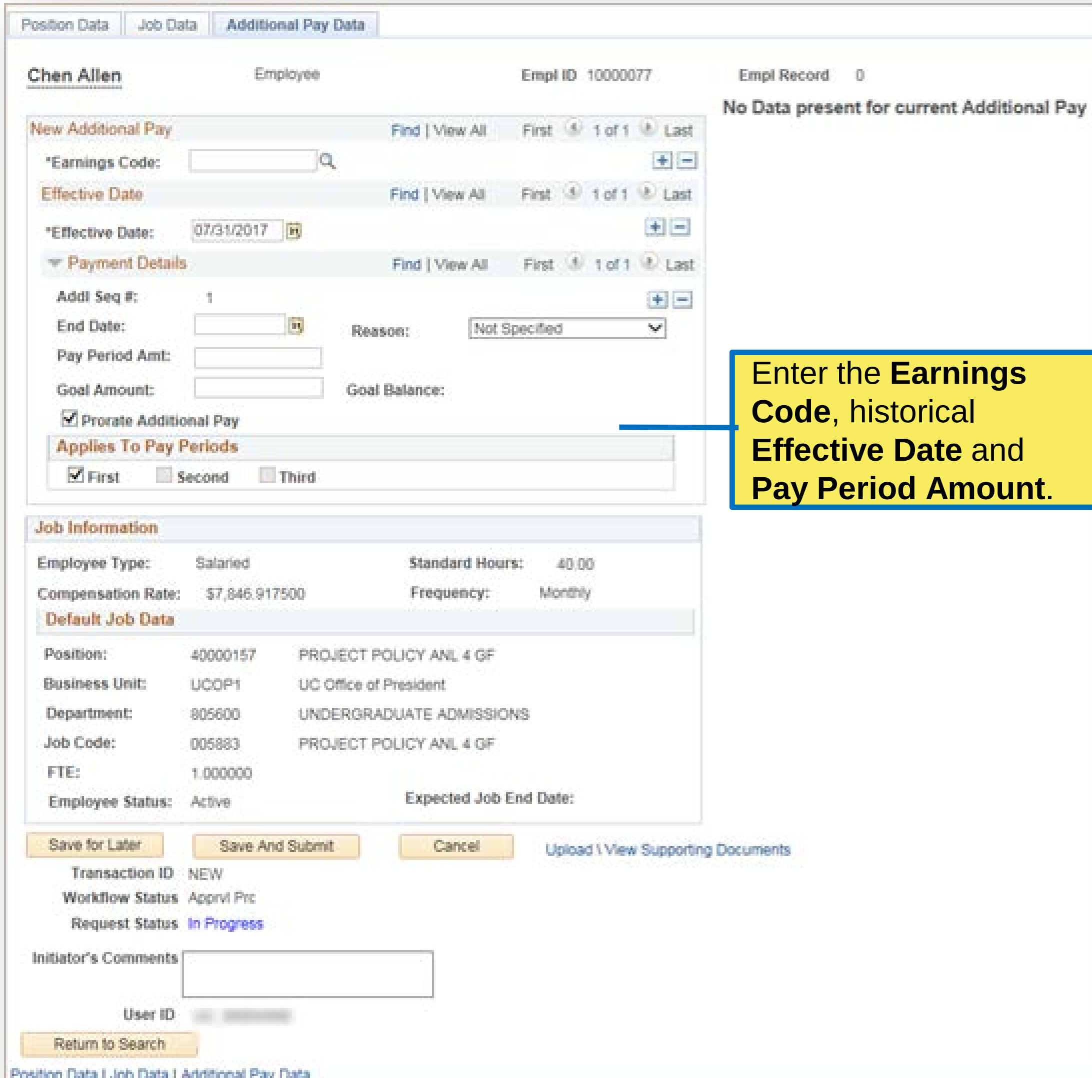
After you enter **the Earnings Code** and the new **Effective Date**, the current recurring information populates and the **Override Data** button appears. Click the **Override Data** button to open the recurring information fields for edit.

Instructor Demo

Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)

- Watch as your instructor demonstrates how to update an existing recurring additional pay PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the ***Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)*** topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Retroactive Additional Pay



- Retroactive dating is available for additional pay.
- The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the **Effective Date**.
- In the **Effective Date** field, enter the previous pay period date that the additional pay should have started.

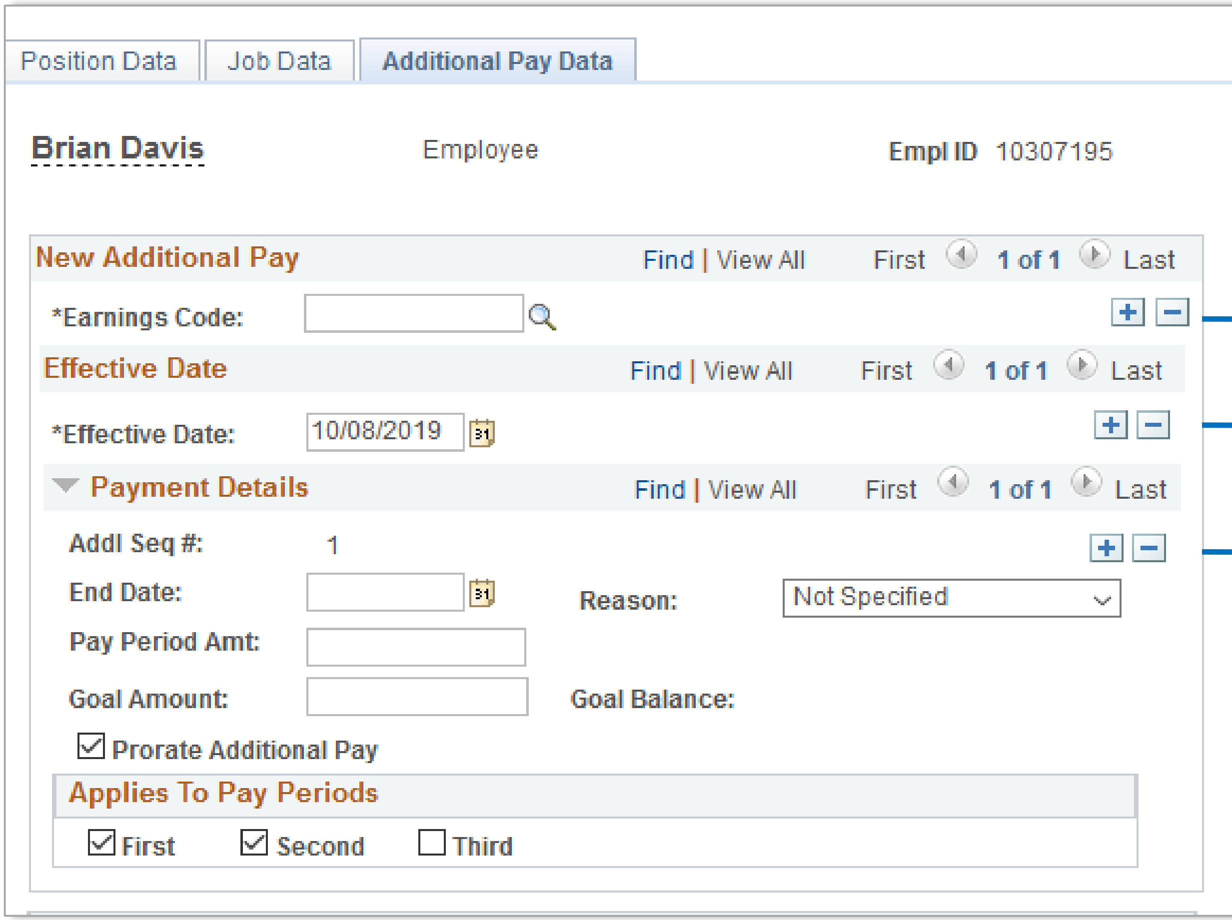
Instructor Demo

Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

- Watch as your instructor demonstrates how to initiate a retroactive additional pay PayPath transaction in UCPath.
- Follow along using the UCPath Help topic.
  - Open the UCPath Help site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- Access the UCPath Help site for an opportunity to practice this task.

Multiple Additional Pay Actions

You can process multiple **Additional Pay** actions in the same transaction provided that the **Earnings Code, Effective Date** and **Payment Details** follow the appropriate sequence.



In the **Earnings Code** section, you can add a row to enter

In the **Effective Date** section, you can add a row to enter another additional pay for the

In the **Payment Details** section, you can add a row to enter another additional pay for the same **Earnings Code** on the same **Effective Date** but different **Payment Details**.

Lesson Objectives Review

Having completed this lesson, you should now be able to:

- Describe the key systems steps to complete an additional pay PayPath transaction.
- Initiate additional pay PayPath transaction.
- Initiate update to additional pay PayPath transaction.
- Initiate retroactive additional pay PayPath transaction.

Lesson Assessment

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this lesson.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Fill-In-The-Blank

All additional pay must be entered as a

__**flat per pay period**__ amount.

True or False

Updates can be made to existing recurring additional pay transactions.

TRUE

FALSE

Next

Response Feedback

Sorry, Incorrect!

Correct Answer: TRUE

Continue…

Multiple Choice

- The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the ____________.

A. Pay Period Amount

B. Effective Date

C. End Date

D. All of the Above

E. A and C

Response Feedback

Sorry, Incorrect!

Continue…

Try Again…

Response Feedback

That is Correct!

Continue…

Putting It All Together

- As the Location PayPath Initiator, you initiate position data change, job data change and additional pay transactions, which are workflowed to Location PayPath Approver(s) for approval.
- **PayPath Actions** allows historic, current or future updates in **Position Data** and **Job Data**.
- The position data change **Effective Date** cannot be the same date as any existing effective date for the employee in the **Position Information** component because there is no sequence field for same-date actions.
- **Job Data** changes can be made independent of a position data change. However, if a position data change is made, PayPath automatically updates the **Job Data** page to display the new position information.
- Refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions* job aid for a description of all **Action** and **Action Reason** code combinations.

Course Resources

Where to Get Help

1. Your training materials are available to use as reminders for navigation, codes, and page processing information.
   - UPKs
   - Job Aids
   - Presentation decks

2. Who do you ask for Help now?
   - Continue to do so. Specially trained users (Points of Contact, POCs) are ready to help you within your departments and divisions.
   - Many of the POCs are those you have already worked with.

3. You or the POC contacts the Employee Experience Center (EEC or Service Now) via phone or website to view knowledge base articles and/or open a ticket.

4. The **UCPath Help** site is your last 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, click the appropriate link.
   - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

Training End

Thank You!