

UCI UCPath
Training

SSL301:
Summer Salary

Course Agenda

- ❖ Understanding the Summer Salary Worksheet
- ❖ Entering Summer Salary in UCPath
- ❖ Multiple Components of Pay (MCOP) Worksheet
- ❖ Use Case Scenarios



Lesson 1:

Understanding the Summer Salary Worksheet





Lesson 1 Objectives

In this lesson, you will...

- Discuss each Summer Salary type
- Review how Summer Salary is calculated and applied
- Associate Worksheet Data Values with UCPath Transactions

Summer Salary Types

Effort Bearing S.S.

Compensation paid to an individual, typically from Federal funds or grants, for work performed during the summer months for academic or research duties.

The amount of summer salary is determined by how much effort the individual must report for the completion of specific tasks or milestones.

The individual's effort is reported and tracked on a **separate job record** and measured using the FTE value in the position data.

Non-Effort Bearing S.S.

Compensation paid to an individual for work performed during the summer months but is not paid by Federal funds or grants and does not require effort to be reported.

This type of Summer Salary is not calculated or determined by the amount of effort or time reported, but by the faculty's annual salary amount.

The amount owed is provided as **Additional Pay** on the faculty's existing job record.

Effort Bearing Summer Salary

“**Effort Bearing**” **Summer Salary** is for Faculty members who perform work over the Summer that is paid by federal funds or grants which require them to report / track their effort.

1. *Effort Bearing Summer Salary* is entered as a separate, **Concurrent Job (UC_CONC_HIRE_AC)**, and the **FTE on the position is used to determine percentage of pay and report/track faculty’s effort..**
2. Effort Bearing Summer Salary is **calculated based on nineteen (19) working** days each summer month.
 - 19 working days = 1.0 Position FTE
 - Faculty who work additional days (>19) will require an additional / concurrent job with a separate FTE.
3. The Summer Salary pay amount one summer month is **based on 1/9th of the Faculty’s Annual Salary.**
 - $\text{No.\# of working days} / 19 = \text{Position FTE Value}$



What is Non-Effort Bearing Summer Salary?

“**Non-Effort Bearing**” **Summer Salary** is for Faculty members who perform work over the Summer that is not paid by Federal funds or grants and **does not** require faculty to report or track their effort.

1. Typically associated with Chairs, Associate Deans, etc., who are given administrative summer ninths their total annual salary.

2. Non-Effort Bearing Summer Salary is generally entered as **Additional Pay via PayPath Actions** on the faculty’s current / existing job record. In some cases, an additional / separate job record may be created to facilitate the Additional Pay for Summer Salary purposes. (*Concurrent job using a “0” FTE Position*)

3. **Non-Effort Bearing Summer Salary Calculation for 1 month:** Faculty’s Annual Salary \div 9 (Months) = Additional Pay Amount



Summer Salary Worksheet Overview

The **Summer Salary Worksheet** is utilized by Finance & HR personnel in each division to identify key data values to be used for Summer Salary entry in UCPATH.

Key Notes:

1. Review worksheet details for each summer month to identify Summer Salary amount and entry method.
2. The dates / boxes highlighted in **green** represent the eligible days for Summer Salary calculation.
3. “Concurrent Job” Indicator = **Effort** Bearing
4. “Addt'l Pay” Indicator = **Non-Effort** Bearing

Summer Salary Worksheet 2024 Select a different year _____

Faculty Name: _____ Department: _____
 Employee ID: _____ Title/Step: _____
 Position #: _____ Total # of Days: 0

June 2024							July 2024							August 2024							September 2024						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
					1		1	2	3	4	5	6				1	2	3	1	2	3	4	5	6	7		
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
23	24	25	26	27	28	29	28	29	30	31			25	26	27	28	29	30	31	29	30						

Available Days: June: 10 July: 23 August: 22 September: 15
 Job FTE for June: 0.0000 July: 0.0000 August: 0.0000 September: 0.0000

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath Annual Rate	KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00

Over the Cap Funding:

Month	Paid Over the Cap Amount	Unpaid Over the Cap	KFS Account	Comments/Notes:

Summer Salary amount (if applicable): \$0.00 Summer Compensation Limit (if applicable): \$0.00

Worksheet Help Notes

Click the **RED** corner markers located on the worksheet to reveal text boxes with additional helpful information.

June 2024							July 2024							August 2024							September 2024						
Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa
						1		1	2	3	4	5	6					1	2	3	1	2	3	4	5	6	7
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	31	29	30					
Available Days: <u>10</u>							Available Days: <u>23</u>							Available Days: <u>22</u>							Available Days: <u>15</u>						
Job FTE for June: <u>0.0000</u>							Job FTE for July: <u>0.0000</u>							Job FTE for Aug: <u>0.0000</u>							Job FTE for Sept: <u>0.0000</u>						

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath Annual Rate	KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00

Max FTE in UCPath per job is 1.0. If FTE is over 1.0, create an additional job in UCPath to cover the remaining FTE above 1.0.

Example: 1.2110 FTE = 2 jobs
 Job 1: 1.0 FTE
 Job 2: 0.2110 FTE

Summer Salary Worksheet Rows

23 24 25 26 27 28 29	28 29 30 31	25 26 27 28 29 30 31	29 30
Available Days: 10	Available Days: 5	Available Days: 22	Available Days: 15
Job FTE for June: 0.0000	Job FTE for July: 0.0000	Job FTE for Aug: 0.0000	Job FTE for Sept: 0.0000

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath Annual Rate	KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
July	18	Add'l Pay	0.0000	\$205,000	234567-00			\$21,579.67

The first four (4) columns will show:

- **Month**
- **Number of Working Days**
- **Entry type** (*Concurrent Job or Additional Pay*)
- **FTE** (*Auto calculated when Conc. Job option is selected*)

The next four (4) columns will show the Faculty member's:

- **UCPath Annual Rate**
- **The KFS account** used to pay Summer Salary
- ***Capped Rate (if applicable)**.
 - **Cap Gap Amount** – Amount *not* covered by KFS Account entered, due to fund's cap. (auto-calculated)

The payment amount due for each Summer month will be *auto-calculated* and displayed in **Amount to be Paid** field column.

Over The Cap Funding

If the Cap Gap amount will be **PAID**, enter the dollar amount under the **"Paid Over the Cap Amount"** column.

If the Cap Gap amount will be **UNPAID**, enter the dollar amount under the **"Unpaid Over the Cap Amount"** column.

Enter and identify the **KFS Account** that will be used to fund the paid cap gap amount. *(Do not fill if not paying cap gap.)*

Enter the **month(s)** that have a Cap Gap.

Over the Cap Funding:

Month	Paid Over the Cap Amount	Unpaid Over the Cap Amount	KFS Account

Comments/Notes:	

Summer Session amount (if applicable): \$0.00 Summer Compensation Limit (3/9ths): \$0.00



Lesson Complete

Lesson Summary:

- ✓ **Effort Bearing Summer Salary:**
 - ✓ Calculated using 19 working days in a month
 - ✓ Requires a separate Concurrent job and Position
 - ✓ # of days worked / 19 days = Position FTE

- ✓ **Non-Effort Bearing Summer Salary:**
 - ✓ Calculated by dividing the faculty member's annual salary by 1/9th.
 - ✓ Requires a separate Concurrent job and "0" FTE Position
 - ✓ Paid as Additional Pay on the new Job Record

- ✓ Use the Summer Salary Worksheet to determine what the additional pay amount will be.

Lesson 2:



Entering Summer Salary in UCPath

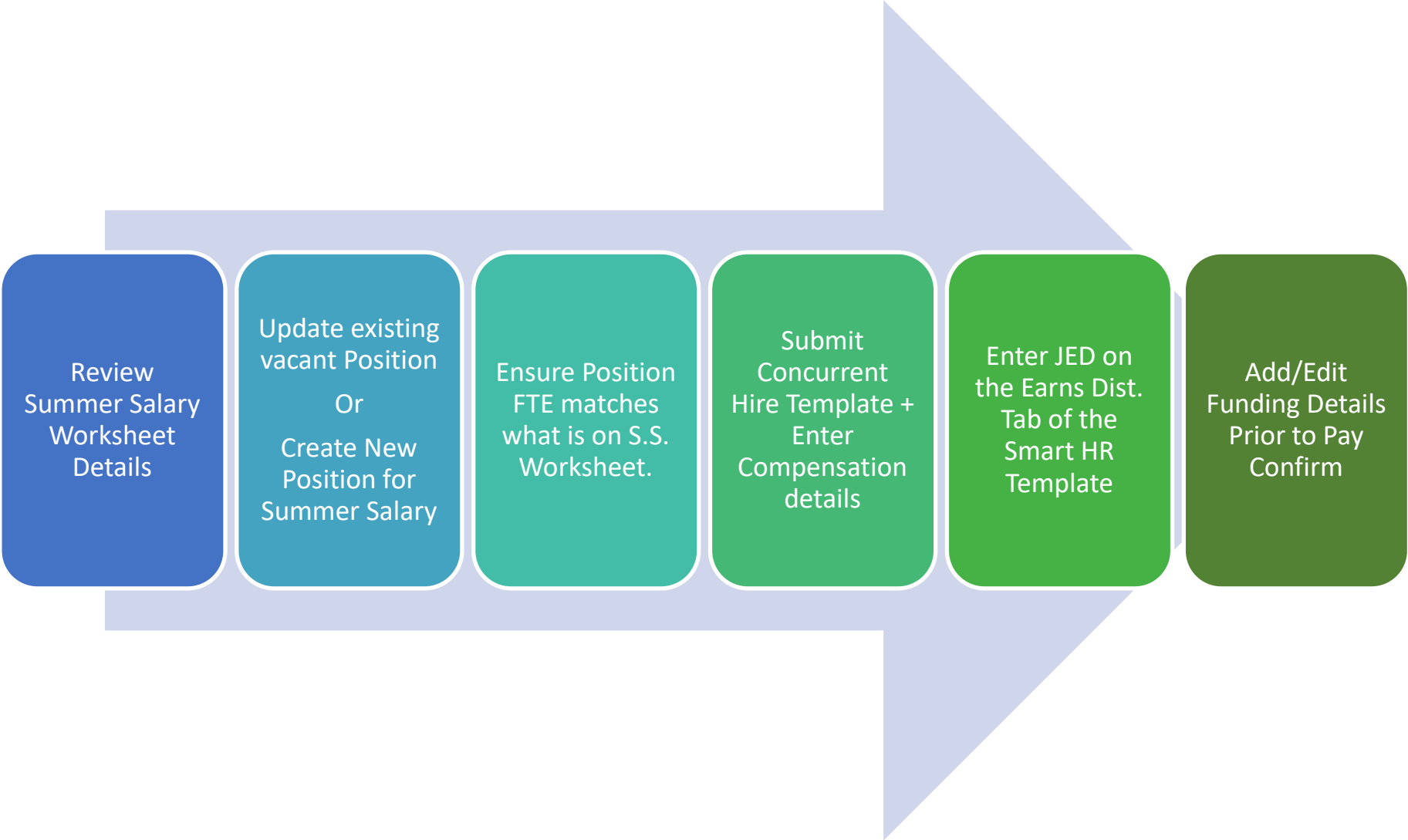


Lesson 2 Objectives

In this lesson, you will...

- Review business process steps for Effort Bearing & Non-Effort Bearing Summer Salary entry in UCPath
- Learn how the varying Summer Salary transactions should be entered and submitted
- Understand the data requirements for each type of Summer Salary entry.

Effort Bearing Entry Overview



Review Summer Salary Worksheet Details

Update existing vacant Position
Or
Create New Position for Summer Salary

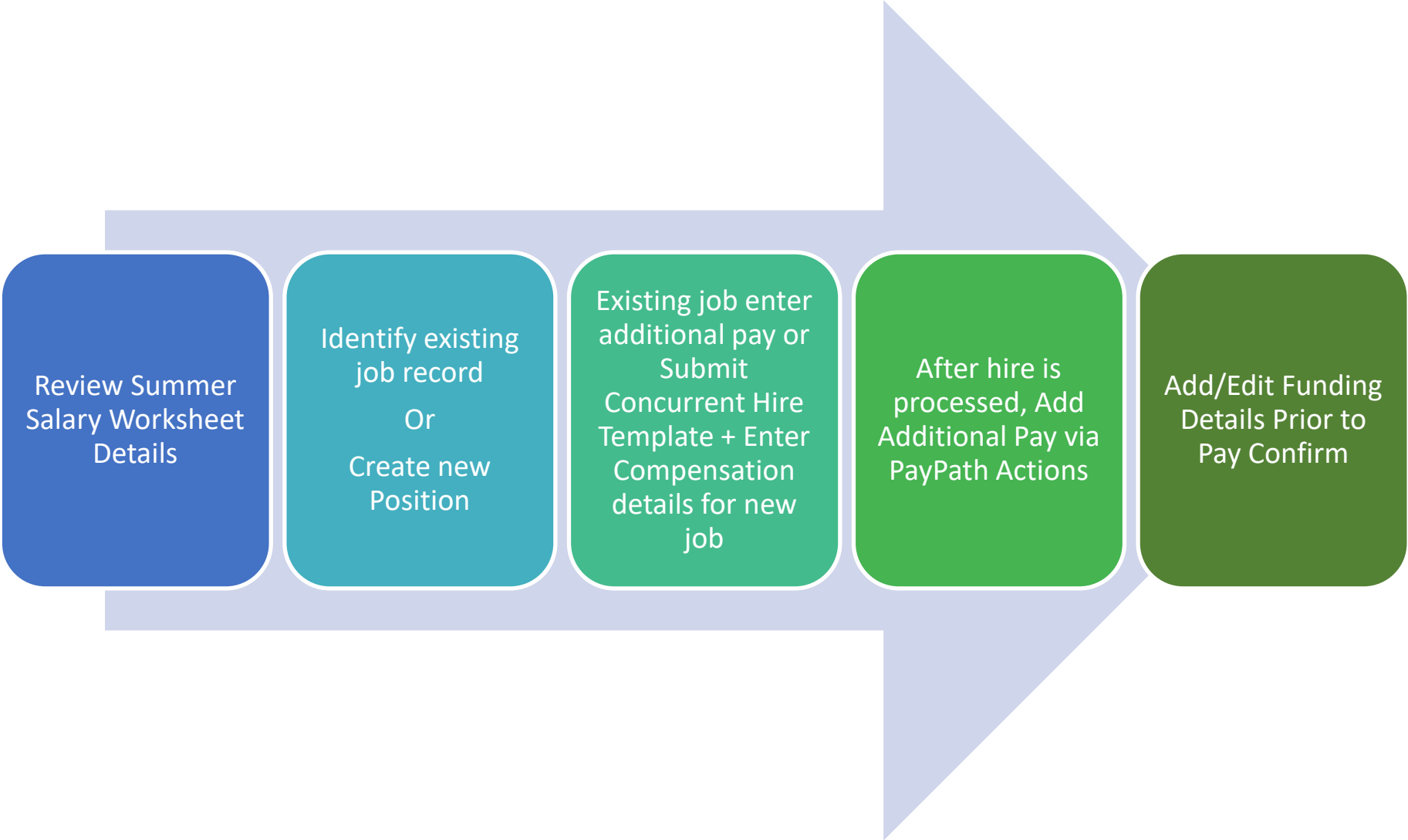
Ensure Position FTE matches what is on S.S. Worksheet.

Submit Concurrent Hire Template + Enter Compensation details

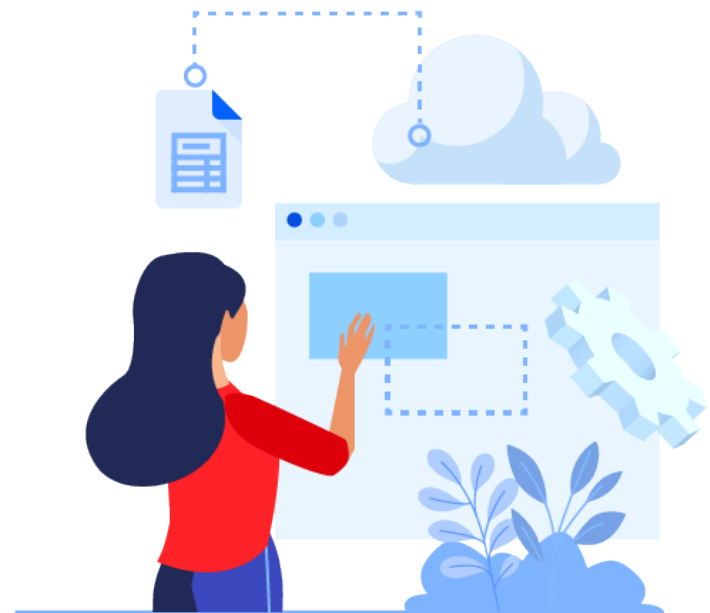
Enter JED on the Earns Dist. Tab of the Smart HR Template

Add/Edit Funding Details Prior to Pay Confirm

Non-Effort Bearing Entry Overview



Step 1: Review Summer Salary Worksheet Data



Review All Summer Salary Data

Be sure to revise each row of data in the Summer Salary worksheet provided.

1. Identify if Summer Salary pay is based on **FTE** or **Additional Pay**.
2. Ensure the faculty's Annual Rate matches what is currently shown in UCPATH.
3. Each row of data reflects a separate Summer Salary entry *(if applicable)*

Summer Salary Worksheet 2024 Select a different year _____

Faculty Name: _____ Department: _____
 Employee ID: _____ Title/Step: _____
 Position #: _____ Total # of Days: 18

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

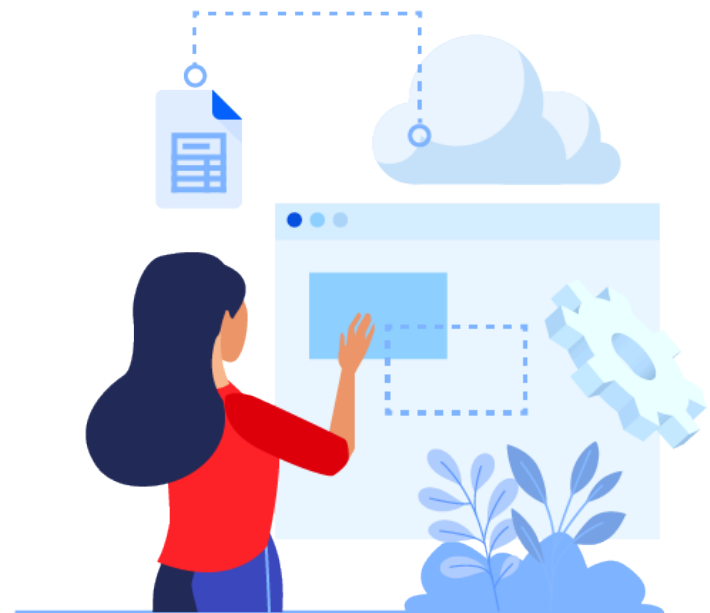
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Available Days: 10 Available Days: 5 Available Days: 22 Available Days: 15
 Job FTE for June: 0.0000 Job FTE for July: 0.0000 Job FTE for Aug: 0.0000 Job FTE for Sept: 0.0000

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath Annual Rate	KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
July	18	Add'l Pay	0.0000	\$205,000	234567-00			\$21,579.67
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00
			0.0000					\$0.00

Step 2: Review / Update Position Data



Review / Update Position Data

❖ Position Details to review:

- Effective Date of Position
- FTE
- Reports-To Position (Supervisor)
- Department ID
- Salary Admin Plan



Recommended: Determine if there is an existing vacant position in your department that can be authorized for use first, before creating a new one.

- HR Initiators may use the **Add/Update Position Info** page within the Position Management tile in UCPath to view "Open" (vacant) positions within their school / department.
 - **Navigation:** PeopleSoft Homepage > Position Management > Add/Update Position > Add/Update Position Info
 - You may also use the **Cognos "Position Report"** located in the Zot Portal.
- **Non-Effort Bearing S.S.:** Positions used for Summer Salary should have a "0" FTE value to avoid potential overpayments.

Position Effective Dates

If a new position has to be created, please use an effective date at least 30 days prior to the faculty's expected start of Summer Salary.

Example: If Summer Salary appointment has a start date of 6/1 – The position effective date should be 5/1



Faculty with Jobs Above 1.0 FTE

During the months of July & August, some Faculty member's percentage of time/effort may exceed 1.0 FTE.

- When a Faculty member's total FTE for all active jobs exceeds 1.0 in any Summer Salary month, an additional job record (concurrent hire) will need to be added with the position reflecting the remaining FTE amount needed to complete the effort reflected for that month.

For Example:

The total FTE calculated for month of August = 1.17 :

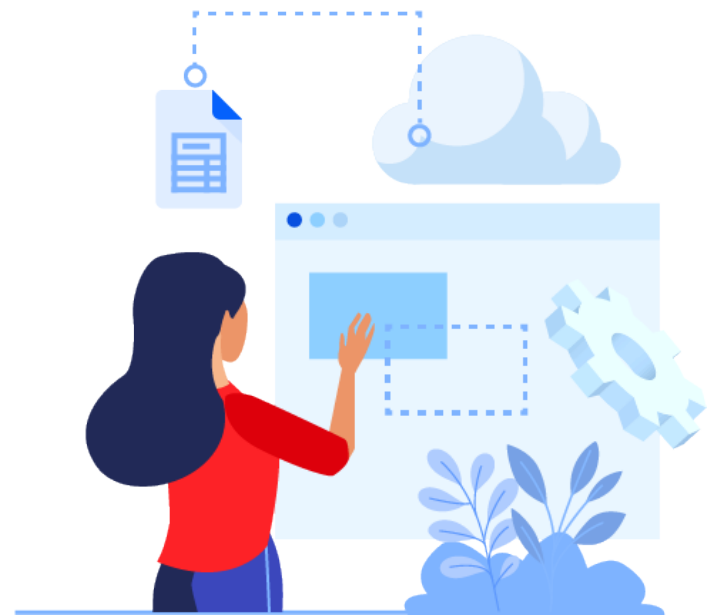
1. Faculty's current active position is already at 1.0 FTE
2. Create new / modify existing vacant position to add the .17 FTE value.
3. Submit another **UC_Conc_Hire** template to add additional job.

*Current Position**
1.0 FTE

+ Add job @
0.17 FTE = 1.17 FTE



Step 3a:
Effort Bearing
Submit
Concurrent Hire
Template



Submit Concurrent Hire Template

To hire faculty into their Summer Salary appointments, please use the [UC CONC Hire AC](#) template.

- The **Effective Date** on the template should reflect the *actual* start date of the faculty's summer research/work.

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template ?

Transaction Type All

Select Template UC_CONC_HIRE_AC

Effective Date 06/01/2022

Academic Concurrent Hire/Inter Location Transfer

Create Transaction

Reason Code: Academic Concurrent Hire

Smart HR Transactions

Enter Transaction Details

The following transaction details are required.

Template Academic Concurrent Hire/Inter Location Transfer

Organizational Relationship Employee

*Empl ID

*Effective Date 06/01/2022

Action Hire

*Reason Code Academic Concurrent Hire

*Address Format United States

Continue Cancel

Entering Compensation Details

1. Enter the faculty's annual salary by selecting the appropriate **Step**, which will default from the Position's *Salary Admin Plan*.
 - Be Sure to include any "Off-Scale" amount, if applicable.
2. The **Pay Components field** will auto-populate with the pay rate amount linked to the selected Step.
 - Click the [+] icon to add another row for additional pay components.
 - If faculty has a negotiated salary amount, calculate the summer salary using the **Total UC Salary (TUCS) rate**.
3. **Effort Bearing:** Please ensure the FTE value on Position matches FTE on S.S. Worksheet.
4. **Non-Effort Bearing:** Please ensure the FTE value on Position selected is "0" to avoid overpayment.

The screenshot displays the 'Job Information - Standard Hours' section with 'Standard Hours' set to 0.000000 and 'FTE' set to 0.0000. Below this is the 'UC Job Data' section with various fields for Probation Code, Probation End Date, Trial Employment End Date, Academic Duration of Appt, Location Use End Date, Location Use Type, Post Docs Anniversary Date, and Cubicle. The 'Job - Salary Plan' section is highlighted with a red box, showing 'Salary Administration Plan' as T001, 'Salary Grade' as 1, and 'Step' as 6. Below this is the 'Job Compensation - Pay Components' table, which is also highlighted with a red box. The table has columns for 'Comp Rate Code', 'Compensation Rate', 'Compensation Frequency', and 'Rate Code Source'. A single row is visible with 'UCANNL', '149300.000000', 'A', and 'Salary Step'. Below the table is the 'Job Compensation - Payroll Currency and Frequency' section with '*Compensation Frequency' set to 'UC_9M'. At the bottom is the 'Work Location - Expected Job End Date' section with 'Expected Job End Date' and an 'End Job Automatically' checkbox.

Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	149300.000000	A	Salary Step

What is Job Earnings Distribution (JED)?

The ***Job Earnings Distribution (JED)*** details, refers to the way in which an employee's earnings are distributed across various earn codes.

- JED must be identified on the Concurrent Hire template upon submission (*Earns. Dist. Tab of the template*) or added via PayPath after hire is completed.
- JED for Summer Salary should only be distributed to **ACR** or **ACA** Earn Codes.
 - *Payroll Adjustment Form will be required to correct the earn code if not applied.*
- Earnings Distribution Type – **By Percent**
- Aggregate Total Percent of Distribution should equal 100%

Personal Data | Job Data | **Earns Dist**

Employee Information

Job Earnings Distribution Type

Earnings Distribution Type: **By Percent** (dropdown menu) | Aggregate Comp Rate:

Job Earnings Distribution | Personalize | Find | View All | First 1 of 1 Last

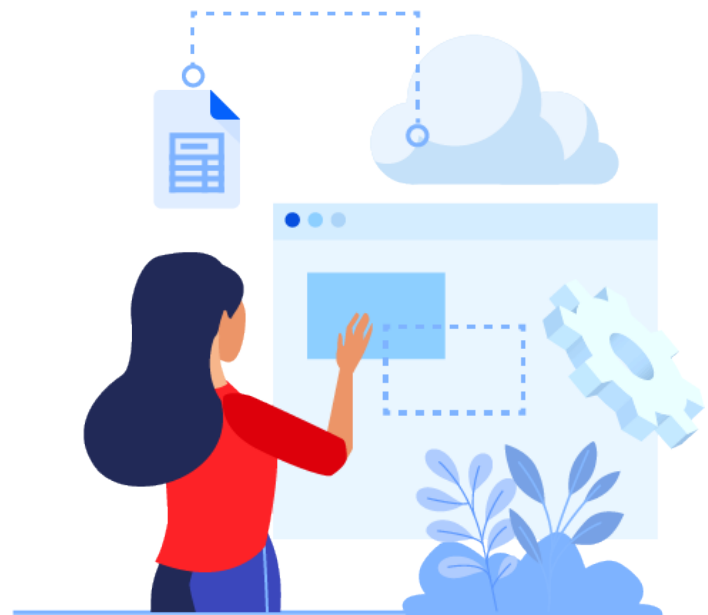
Earnings Code	Compensation Rate	Percent of Distribution
1 <input type="text"/>		<input type="text"/>

Return to Enter Transaction Details Page

Save and Submit | Save for Later | Cancel | Supporting documents

Unpaid Cap Gap Job Aid: <https://spwebserv.ucop.edu/LocationUsers/LOCplayer/index.html?Guid=ca6a8a26-7a3a-4f69-abce-2a0ceee08404>

Step 3b:
(NON-EFFORT BEARING)
**Enter Additional
Pay via PayPath
Actions**



Additional Pay on Existing Job

Non- Effort Bearing Summer Salary is generally entered as an Additional Payment on the faculty's **current / existing appointment**.

- Navigate to **PayPath Actions**
 - *Navigation:* PeopleSoft Homepage > HR Tasks > PayPath Actions
- Click on the **Additional Pay** tab and enter the payment details.

The screenshot displays the PeopleSoft PayPath Actions interface. At the top, there are three tabs: 'Position Data', 'Job Data', and 'Additional Pay Data', with the latter being highlighted by a red box. Below the tabs, there are input fields for 'Employee', 'Empl ID', and 'Empl Record' (value: 1). A 'Position Data' link is visible on the right. The main section is titled 'Position Data' and contains the following fields: 'Position Number' (input field), 'Effective Date' (input field with value '04/13/2022' and a calendar icon), 'Action' (value: POS), 'Position Change' (text), and 'Position Change Reason' (input field with a search icon). At the bottom, there are two columns: 'New Values to update' and 'Existing Values'. The 'Existing Values' column shows 'Current Effective Date: 10/01/2021'.

Additional Pay Details

When entering Additional Pay please identify the following:

1. Earnings Codes
 - i.e., ACR or ACA
2. Effective Date & End Date
 - *Please use full pay cycles for the Begin & End Dates.*
3. Additional Pay Amount Per Pay Period
4. Goal Amount (*optional*)

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

*Earnings Code: ACR Additional Comp-Research

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 06/01/2022

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: 06/30/2022 Reason: New Additional Pay

Pay Period Amt: \$2,516.25

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Incorrect CBR Rates & Additional Pay

If the Additional Payment on the faculty's existing job results in an incorrect CBR (*Composite Benefit Rate*) being charged, **create a new/separate job for the Summer Salary Additional Payments to prevent future errors.**

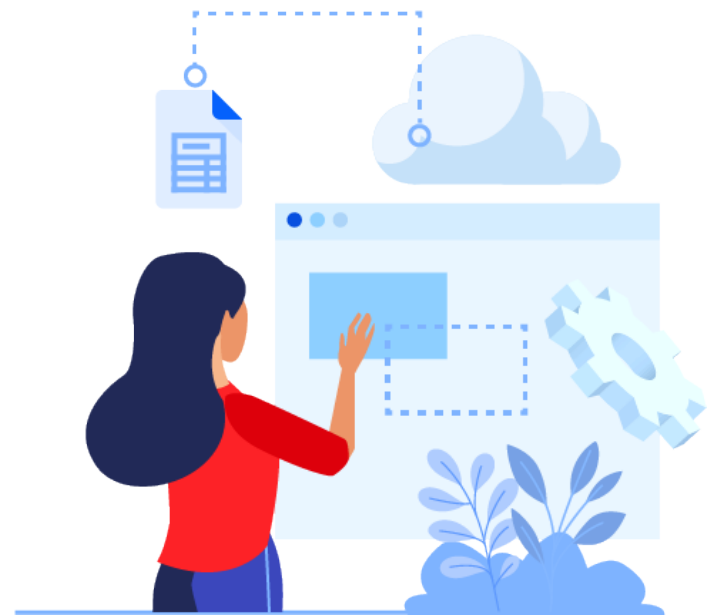
To correct CBR will require a Payroll Adjustment Form; please coordinate with UCI Payroll



CBR Rate Workaround

1. Modify an existing position or create a new position with [eligible Summer Salary title code](#) and a “0” FTE.
2. Submit a Concurrent Hire Template (UC_Conc_Hire_AC)
3. After Smart HR Template is approved & processed, navigate to PayPath Actions to enter the Additional Pay on new job record.

**Step 4:
Add Funding
Details Before
Pay Confirm**



Funding Entry Reminders



Funding details need to be entered at least two (2) days prior to pay confirm to avoid expenses being charged to the default account



If the Additional Pay for Summer Salary is paid from different/various department accounts, or a grant, please ensure the correct funding has been setup on the position. (A separate/new funding row may be required.)



Reminder: Funding is assigned by earn code. Failure to identify the correct Earn Code may result in the incorrect CBR rate.



Accounts must have a combined distribution amount that equals 100% per Earn Code.



Lesson Complete

Lesson Summary:

- ✓ **Effort Bearing Summer Salary Entry:**
 - ✓ Identified as a “*Concurrent Job*” on the Summer Salary Worksheet
 - ✓ Relies on the Position FTE value to determine pay amount
 - ✓ Identify JED on the Hire template or via PayPath prior to pay confirm.

- ✓ **Non-Effort Bearing Summer Salary Entry:**
 - ✓ Identified as “*Add'l Pay*” on the Summer Salary Worksheet
 - ✓ Requires a separate Concurrent job and “0” FTE Position
 - ✓ Paid as Additional Pay on the new Job Record

- ✓ Use the Summer Salary Worksheet to determine what the additional pay amount will be.

Lesson 3:



Multiple Components of Pay (MCOP) Worksheet



Lesson 3 Objectives

In this lesson, you will...

- Understand the finance related data requirements
- Review business process steps for entering Funding for Summer Salary Position
- Learn how and when to use the Multiple Components of Pay (MCOP) Worksheet in UCPath

Funding for Summer Salary

- Navigate to the **Funding Entry** page to access the **Salary Cap/MCOP Worksheet**

Funding Entry

Request ID: NEW
Set ID: IRCMP Department: Request Status: In Progress
Fiscal Year: 2022 Budget Begin Date: 07/01/2021 Budget End Date: 06/30/2022

Level Find | View All First 1 of 3 Last
Department Position Pool Position
Position Number: ASST PROF-AY-B/E/E Pool ID:

Job Data Snapshot Personalize | First 1 of 1 Last
Job details 1 Job details 2

Name	Empl ID	Empl Rcd	Effective Date	Eff Seq	Department	Job Class	Job Desc	Status	Expire Date	e-Verify
1							ASST PROF-AY-B/E/E			<input type="checkbox"/>

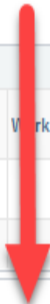
Funding Effective Date: 08/01/2021 Eff Seq: 0 Status: Active Record Status: Saved to Database

Earnings Distribution Personalize | Find | First 1-2 of 2 Last

Em Cd	Seq #	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	KFS Sub Account	Work Study Ind	Over the Cap	Funding End Date	Pay Dist %
1	ACR	IR	EP1:			SUMSAL	02	IRFIN				08/31/2021	100.000
2		IR	GF:...			FAC	00	IRFIN					100.000

Justification document
Add Attachment View Attachment Delete Attachment Budget Distribution Details **Salary Cap / MCOP Funding Worksheet**

Use the link below
to access the
**Salary Cap/MCOP
Worksheet**



Salary Cap/MCOP Worksheet

- Contains 3 sections, must be completed from top down.

Salary Cap/MCOP Funding Worksheet

Empl ID: 10272395 Empl Rad: 1
Position Number: Budget End Date: 06/30/2022
Fiscal Year: 2022 Budget Begin Date: 07/01/2021

Compensation Data Snapshot Find | View All First 1 of 4 Last

As of Date: 02/01/2022 Eff Seq: 0
Salary Plan: T003 Comp Freq: UC 9/12 - AY
Salary Grade: 3 FTE: 1.000000
Step: 3

Pay Component	Emr Cd	Monthly	Annual	Percentage
ACR		\$12,200.00	\$146,400.00	100.000000
Total UC Salary		\$12,200.00	\$146,400.00	100.000000

Default Funding Profile Find | View All First 1 of 1 Last

Effective Date: Eff Seq: 0

Emr Cd	OTC Indicator	KF & Chart Code	KF & Account	KF & Org	Fund	Project ID	Sub	GL Bus Unit	KF & Sub Account	Work Study Ind	Distribution %
1											

Funding Distribution Worksheet Find | View All First 1 of 1 Last

Date of Entry: 03/18/2022 Eff Seq: 0 Last Updated By: IRCMP_GLInitiator_060

Begin Date	End Date	Emr Cd	KF & Chart Code	KF & Account	KF & Org	Fund	Project ID	Sub	GL Bus Unit	KF & 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
1									IRFIN				\$0.00		\$0.00	<input type="checkbox"/>	0.000000	0.000000	

Funding Distribution Preview Return to Funding Entry

1

3 sections of the Salary Cap/MCOP Funding Worksheet

2

3

Compensation Data Snapshot

- Pulls in the information from the Pay Components section of Job Data.
- This section is read-only, no updates are entered here.

Salary Cap/MCOP Funding Worksheet

Empl ID: [redacted] Empl Rcd: 1 [redacted]
Position Number: [redacted] ASST PROF-AY-B/E/E
Fiscal Year: 2022 Budget Begin Date: 07/01/2021 Budget End Date: 06/30/2022

Compensation Data Snapshot Find | View All First ◀ 1 of 4 ▶ Last

As of Date:	02/01/2022	Eff Seq:	0
Salary Plan:	T003	Comp Freq:	UC 9/12 - AY
Salary Grade:	3	FTE:	1.000000
Step:	3		

Pay Component	Ern Cd	Monthly	Annual	Percentage
	ACR	\$12,200.00	\$146,400.00	100.000000
Total UC Salary		\$12,200.00	\$146,400.00	100.000000

Default Funding Profile

- This is where the “over the cap” and “up to the cap” funds are identified.
- OTC Indicator = N will fund up to the cap amount in this account.
- OTC Indicator = Y will fund the over the cap amount in this account.

Default Funding Profile Find | View All First 1 of 1

Effective Date: 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	GF10004	8530	19990		00	IRFIN			100.000
2	Yes	IR	FG20009	7626	21614		00	IRFIN			100.000

Funding Distribution Worksheet

- Enter the funding information for the “up to the cap fund”
- Enter the **Percent of Effort** (this column should sum to 100% of pay)
- Click the **Funding Distribution Preview** button

Funding Distribution Worksheet

Date of Entry: 03/18/2022 Eff Seq: 0 Last Updated By: IRCMP_GLInitiator_004

Begin Date	End Date	Em Cd	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	KFS Sub Account	Work Study Ind
1			IR	GF10004	8530	19990		00	IRFIN		

Funding Distribution Preview Return to Funding Entry

Find | View All First 1 of 1

Over the Cap	UC Monthly Salary	Annual Rate	Total Allocated Amt	\$ Amt Firm?	Percent of Effort	Percent of Effort	Cap Type	Cap Rate (Annual)	Prorated Cap Rate (Annual)	Prorated Cap Rate (Monthly)
	\$12,200.00	\$146,400.00	0.00	<input type="checkbox"/>	0.000000	0.000000				

Funding Distribution Preview

- This page shows how the funds will be distributed among the funds entered.

Fiscal Year: 2022 Budget Begin Date: 07/01/2021 Budget End Date: 06/30/2022

Funding Distribution Preview Find | View All First 1 of 1 Last

Date of Entry: 03/18/2022 Eff Seq: 0

Begin Date: 02/01/2022 End Date: 03/31/2022 Total Monthly Amount: \$12,200.00 Percent of Pay: 100.000

Personalize Find First 1 of 1 Last															
Ern Cd	Over the Cap	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	Work Study Ind	Monthly Rate	Percent of Pay	Percent of Effort	Cap Rate (Annual)	Prorate Cap Rate (Annual)	Prorated Cap Rate (Monthly)
1	ACR	IR	GF10004	8530	19990		00	IRFIN		\$12,200.00	100.000000	100.000000			

Begin Date: 04/01/2022 End Date: 06/30/2022 Total Monthly Amount: \$12,200.00 Percent of Pay: 100.000

Personalize Find First 1 of 1 Last															
Ern Cd	Over the Cap	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	Work Study Ind	Monthly Rate	Percent of Pay	Percent of Effort	Cap Rate (Annual)	Prorate Cap Rate (Annual)	Prorated Cap Rate (Monthly)
1	ACR	IR	GF10004	8530	19990		00	IRFIN		\$12,200.00	100.000000	100.000000			

[FAU Monthly Preview](#) [Submit to Funding Entry](#) [Return to Salary Cap/ MCOP Funding Worksheet](#)

Funding Entry Submission

- Once the Salary Cap/MCOP Worksheet is complete, the initial Fund Entry page displays the entry for submission.
- Typically for Summer Salary 100% of earnings is charged to the ACR (or applicable) Earn Code.

Job Data Snapshot Personalize | Find | First 1 of 1 Last

Job details 1 | Job details 2

Name	Empl ID	Empl Rcd	Effective Date	Eff Seq	Department	Job Code	Job Code Descr	Payroll Status	Expected Job End Date	e-Verify
1						001343		Active		<input type="checkbox"/>

Funding Effective 04/01/2022 Eff Seq: 0 Status: Active Record Status: In Progress

Earnings Distribution Personalize | Find | First 1-2 of 2 Last

Ern Cd	Seq #	KFS Chart Code	KFS Account	KFS Org	Fund	Project ID	Sub	GL Bus Unit	KFS Sub Account	Work Study Ind	Over the Cap	Funding End Date	Pay Dist %
1	ACR	1	IR	GF10004	8530	19990	00	IRFIN				<input type="text"/>	100.000
2			IR	GF10004	8530	19990	00	IRFIN				<input type="text"/>	100.000

Lesson 4:

Summer Salary Use Case Scenarios



Demo of Employee Setup

Training Environment Link:

<https://ucphrtr1pub.universityofcalifornia.edu/psp/ucphrtr1/?cmd=login&languageCd=ENG&>

- Employee ID: 10007741
- Employee Record: 18

- Position #: 40734216
- Department ID: IR8081

Summer Salary Scenario



Dr. Perez received a grant to perform research for 16.5 days during the month July.

Dr. Perez’s annual salary is \$157,688 and the KFS Account used to pay the summer salary is a capped fund, however, the department will **NOT** be covering the Cap Gap.

Answer the following:

- 1. Is this likely Effort Bearing or Non – Effort Bearing Summer Salary? Effort Bearing
- 2. What should the FTE value be for July? 0.8684
- 3. Is there a need to fill-in / use the MCOP worksheet? Yes
- 4. Is there a need to enter a funding line for “Over The Cap” amounts in this scenario? No
- 5. What Earn Code is entered in JED to represent the unpaid Cap Gap? GAP



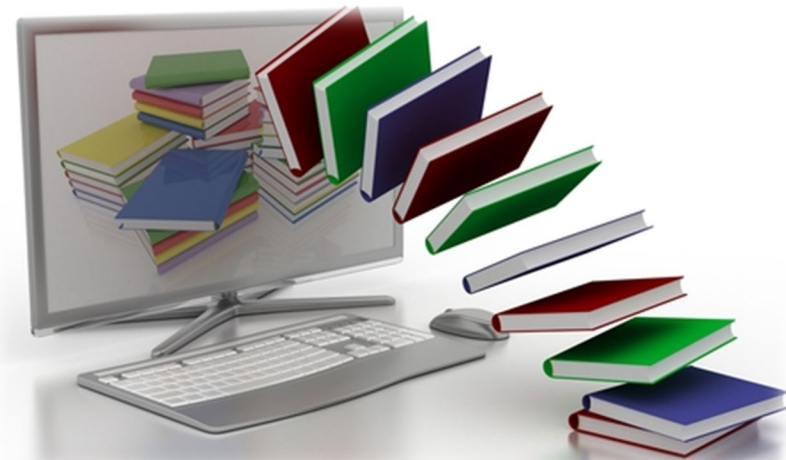
Course Summary

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

- ✓ Understand the Summer Salary Worksheet Data
- ✓ Enter Effort Bearing & Non-Effort Bearing Summer Salary transactions in UCPath.
- ✓ Recognize how faculty are paid for each summer salary type.
- ✓ Add Summer Salary Additional Pay on the new job record after concurrent hire has been processed.

UCI UCPath

UCPath Support Resources



UCI UCPath Website

- The [UCI UCPath](#) website is your first line of support for all UCPath related questions.
- Use the **Search** tool on the website to find a wide selection of UCPath training content and additional support resources.

You may also find things like:

- *Course Curriculums*
- *Job Aids*
- *Training Materials*
- *Newsletters & More!*



Point Of Contact (POC)



For immediate assistance regarding UCPATH transactions, please contact your School's **Point of Contact (POC)** for direct support or your AP representative.

Employee Experience Center (EEC)



Need troubleshooting assistance? Contact the **Employee Experience Center (EEC)** at (949) 824-0500, or submit an online ticket by visiting ucpath.uci.edu

THANK YOU!



This concludes the training session
for **SSL301: Summer Salary**

*Have questions about this course or other training requirements?
Please contact UCPathTraining@uci.edu*