

Glossary

TERM	DEFINITION
Year End (YE) Documents	The Year End (YE) documents are used to record transactions that occurred during a Fiscal Year, but were not recorded prior to the end of the final accounting period for that Fiscal Year.
17.5 Hour Rule	In order to become initially eligible for benefits, the newly hired employee's appointment is evaluated using the following three factors: percentage, duration, and appointment type. To continue eligibility at the assigned benefit level, an employee must maintain an average regular paid time of at least 17.5 hours per week in an eligible appointment type after the 1 year anniversary (See CEMLI E-025).
Absence Entitlement	Absence Entitlements are also known as an Entitlement accrues in an employee's personal paid time off account representing as a balance. An employee earns Entitlements.
Academic Pay Solution (APS)	Academic Pay Solution is a custom, comprehensive solution for managing Academic Pay and Salary Cap in UCPATH that facilitates timely, accurate, efficient, and compliant pay.
Academic Personnel Directors (APD)	Academic Personnel Directors (APD)
Academic Programmatic Units (APU)	Grouping of compensation plan members for the express purpose of determining an appropriate Health Sciences Salary Scale, and the rationale for establishing "Y" (negotiated) and "Z" (bonus/incentive) compensation.
Access Level	<p>Access is granted at the Page level and defines the action(s) a user can take on a specific page. Actions includes:</p> <p>Add - The user can create new high-level key information through the search page.</p> <p>Update/Display - The user can view the current row. The user can view, insert, and update future rows.</p> <p>Update/Display All - The user can view the history and current rows. The user can view, insert, and update future rows.</p> <p>Correction - The user can view, insert, and update history, current, and future rows.</p> <p>Display Only - This check box authorizes view only user access to the page. No fields are active when this check box is selected.</p>

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Accruals	Accruals are balances of entitlements, calculated in accordance with UC Policy using formulas based on job eligibility criteria and time worked. Accrual balances will be calculated in either local T&A systems or UCPath (depending on the type of accrual), and will be stored in UCPath.
Additional Compensation	Additional pay is any amount paid to an employee which is in addition to the employee's regular, base compensation.
Adult Dependent Relative (ADR)	Refers to Involuntary Loss of Benefits due to an Adult Dependent Relative age out.
Affordable Care Act (ACA)	Affordable Care Act legislates healthcare reform including new benefits, rights and protections, rules for insurance companies, taxes, tax breaks, funding, spending, the creation of committees, education, new job creation and more.
Annual Benefits Base Rate (ABBR)	Some benefits, such as life and disability insurance, can be based upon the employee's compensation rate or an annual benefits base rate (ABBR) that you define for the employee. PeopleSoft (PS) delivers a way to define an amount to be used in the calculation of life and disability insurance. The ABBR can be used in place of the annual rate in the event that the annual rate includes an amount that should not be included when calculating the benefit cost or coverage basis. (See CEMLI E-043- Automated Calculation of ABBRs.)
Approval Workflow Engine (AWE)	Routes transactions for approval before they are finalized in UCPath.
Arrears	An unpaid and overdue debt —usually used in plural such as the employee's account is in arrears therefore he is paying off the arrears of the past several months.
Assessment Rates	There are multiple assessments that the Budget Office coordinates on campus. The Budget Office is responsible for making recommendations to the Chancellor as to the assessment levels and implementing approved levels.
At Your Service On Line (AYSO)	The Leave Buyback Estimator, a self-service tool, on At Your Service On Line (AYSO) that allows employees to produce cost estimates for a LOA buyback to give an employee the general cost of a buyback and the potential increase in retirement benefit as a result of the buyback. https://atyourserviceonline.ucop.edu/ayso/
Automated Clearing House (ACH)	Automated Clearing House (ACH) is an electronic network for financial transactions in the United States. ACH processes large volumes of credit and debit transactions in batches. ACH credit transfers include direct deposit, payroll and vendor payments.
Automatic Termination	If the Org/Dept. has indicated that an employee may be terminated automatically, they will be terminated once they reach their job end date without the Org/Dept. having to process a termination transaction. After the employee is terminated, the Org/Dept. can process any necessary final pay transactions using WFA.05 Involuntary & WFA.16 Voluntary Terminations.
Award Amount	Earnings a student receives (including both Work Study funds and Department share) in an academic year of which a percentage will be paid by Work Study program funds.

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Batch Hire	The action in UCPath of hiring groups of employees at one time. Batch hires may not be used for Employees that have Additional Compensation or JED. Although the employees do not need to be identical to be eligible for a batch hire (they can have different effective dates, position numbers, compensation, etc.), the process will primarily be used by departments that hire large groups of employees at once. _____
BELI	Benefits Eligibility Level Indicator or BELI code indicates an employee's eligibility for health and welfare benefits and controls access to the UC plans. All employees must have a BELI assigned to them before enrolling with an effective date representing when the BELI status began.
Beneficiary Care Coordinator	A UCPC employee assigned to each death case so that if there is survivor contact, it can be consistent during an understandably stressful time.
Benefit Cost Transfer (BCT)	A Benefit Cost Transfer (BCT) is a transfer to move benefit expenses from a specific Full Accounting Unit (FAU) / Chartstring (i.e. combination code, funding source) to another FAU.
BNY Mellon	The Bank of New York Mellon was formed on July 1, 2007, as a result of the merger of The Bank of New York and Mellon Financial Corporation. BNY Mellon is the world's largest custodian bank which manages the University of California's ACH payroll deposits.
Break in Service	A break in service is any separation from employment status. In addition, a break in service occurs, effective the last day on pay status, whether or not a separation form is submitted, when an employee is off pay status for four complete, consecutive calendar months without an approved leave without pay, furlough or temporary layoff.
Budget and Capital Resources (BCR)	Budget and Capital Resources (BCR) generates system-wide staffing reports that are submitted to the State.
Budget Data Export (BDE)	Extracts budget data from the Employee Detail, Job Data, Position Data, and Budget Distribution tables to create a standardized set of budget data. BDE tables include Budget Employee Detail, Budget Job Detail, Budget Position Detail, and Budget Funding.
Budget Distribution Page (BDP)	Locations enter budget data at the Position level for filled or vacant positions on this page. See CEMLI E-712.
Bureau of Labor Statistics (BLS)	The Bureau of Labor Statistics is the principal fact-finding agency for the Federal Government in the broad field of labor economics and statistics.

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Business Unit (BU)	Each UC campus and med center is identified by a 'Business Unit' which will be used to segregate campus information for reporting and system security access. For example IRCMP and IRMED
California Family Rights Act (CFRA)	The California Family Rights Act (CFRA) authorizes eligible employees to take up a total of 12 weeks of paid or unpaid job-protected leave during a 12-month period. While on leave, employees keep the same employer-paid health benefits they had while working.
California Public Employees Retirement System (CalPERS)	The California Public Employees' Retirement System (CalPERS) is an agency in the California executive branch that "manages pension and health benefits for more than 1.6 million California public employees, retirees, and their families
California State Teachers' Retirement System (CalSTRS)	Provides retirement, disability and survivor benefits for full-time California public teachers.
Cap Gap	The difference between the capped salary rate and the full total negotiated salary (distributed salary) rate that an employee receives. The Cap Gap typically must be charged to a non-federal and/or discretionary funding source. Same as OTC.
Capital Accumulation Payment (CAP)	These accounts consist of money that UC allocated to eligible Plan members on various dates during those years to supplement other UCRP benefits. The allocations are based on a percentage of an employee's covered compensation for a period prior to the allocation date. CAP balances earn interest at an annual percentage yield
Cascade	Within filled Positions, automatically pushing Position updates to incumbent(s)' job record.
Catastrophic Health Care Provider Certification	Set forth by California Family Rights Act (CFRA) requires form CalHR 754 to be completed by Leave Administrator in Part A, the Employee in Part B and the Health Care Provider in Part C to certify an employee's serious health condition
Catastrophic Illness	A catastrophic illness or injury is a serious health condition or injury that incapacitates the employee or a member of the employee's family or household and creates a financial hardship because the employee has exhausted all eligible paid leave credits.
Catastrophic Leave Program	The Catastrophic Leave Program permits salary and benefits continuation for eligible employees due to their own serious illness or injury or due to the need to care for a seriously ill member of the employee's family or household and who have exhausted all paid leave.
Catastrophic Leave Program General Pool	Donated leave is put in the General Pool for recipients to draw from.
CEMLI	Configurations, Extensions, Modifications, Localizations and Integrations. Also known as Functional Design Document (FDD).
Change	An update to information in UCPath made by submitting a new transaction, generally with a different effective date than the previously submitted transactions. Previously submitted information will still exist as history in UCPath after a change transaction is submitted.

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Chart of Accounts (COA)	The Chart of Accounts (COA) is a set of tables that define the coding structures within the Kuali Financial System (KFS). Its purpose is to support and validate entries into a general ledger. It also serves other functions such as reporting, internal controls and document routing. The Chart of Accounts is defined by a hierarchy that begins with the Chart, Organization, Account, and then Object Code. For example, UCI legacy system uses five charts: University of California; UC, System wide; SW, Irvine; IR, Foundation; FD, and Medical Center; MD.
Chartfield	The Chart of Accounts is comprised of information fields that provide the basic structure to segregate and categorize transactional and budget data. Each informational field is called a "CHARTFIELD". Combining a series of chartfields makes up a Chartfield String.
Checklist	A template that will be developed centrally at UCI to help Org/Dept. gather information, complete process steps and communicate necessary UCPath transaction information to the HR Initiator. Org/Dept. can adjust this checklist to account for any specific procedures. The checklist will include UCI and UCPC required information and documentation that is needed to complete the process.
Checkpoint	A marker for evaluation prior to annual performance review. This can be the end of a probationary period or halfway through the year such as a Mid-Period Checkpoint. Checkpoints provide managers and employees the ability to track employees' progress more closely during the performance period and provide feedback and guidance along the way, ePerformance implements the Track Progress functionality that allows the administrator to define checkpoints throughout the performance period where the manager and employee can enter comments regarding the evaluation. While a checkpoint is in progress, the manager and employee can share comments with each other and stop sharing if deemed necessary. Information exchanged in completed checkpoints will be stored in the system for future reference, such as when the employee works on the self evaluation or when the manager prepares the evaluation for the employee.
Claimant	The person (former employee) who filed the UI claim.
COBRA	The Consolidated Omnibus Budget Reconciliation Act of 1985 (or COBRA) is a law passed by the U.S. Congress mandates an insurance program which gives some employees the ability to continue health insurance coverage after leaving employment. Individuals may continue coverage under COBRA for up to 18 months if you terminate employment or you lose eligibility for UC-sponsored health plans (due to transfer to an ineligible position or if your average hours worked fall below 17.5 hours per week). Your family members generally may continue coverage for up to 36 months if they lose coverage because: a) the family member loses eligibility (e.g., turns age 26) or b) you divorce, legally separate, get an annulment, end a domestic partnership, or die.

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Collective Bargaining Unit	Under the California Higher Education Employer-Employee Relations Act (HEERA), a collective bargaining unit is a group of job positions/job titles with a sufficient "community of interest" that a union can reasonably represent the employees. Collective bargaining is a bilateral decision-making process involving direct negotiations, in which the University and the exclusive representative of the employees (usually called a "union") determine wages, hours of work and other terms and conditions of employment for all employees in the bargaining unit. A contract between a union and the University is referred to as a Collective Bargaining Agreement (CBA).
Combination Code	UCPath field that is essentially a shortcut for the underlying Chartfield elements that make up a Chartstring. A combination code represents a Chartstring or FAU.
Commitment Accounting (CA)	Commitment Accounting enables laying claim or encumbering against budgeted funds. Encumbered funds are spoken for, so to speak, and can't be used for any other purposes. By budgeting for anticipated expenses and setting money aside, you ensure that your spending is within your budget.
Compensation Frequency	Compensation frequency determines when the employee receives their paycheck (e.g., biweekly, monthly, etc.).
Composite Benefit Rate (CBR)	Employee benefits associated with employment within the University of California system will be assessed at a simplified Composite Benefit Rate (CBR). The CBR will be associated with campus and Employee class specific rates. Campuses require the automated ability to relieve these costs in real time. At the end of each Fiscal Year (FY), UCPath will analyze the past year's rate against the actual benefit expenses incurred and adjust the rate accordingly. UCPath Locations will adopt a negotiated Composite Benefit Rate for charging most benefit costs to departments and sponsors in lieu of charging actual benefit expense based on Salary Expenses.
CONEXIS	CONEXIS a division of WageWorks handles COBRA administrative services for UC.
Contingent Worker (CWR)	An individual engaged by the University on a non-permanent basis to complete a specific function or task who does not have an employee relationship with UCI and does not receive remuneration through UCPath. Refer to WFA.01 Add or Renew Contingent Worker for additional information.
Control Point (CP)	Level 1 Dept ID below Business Unit and above Department, Center, Organized Research Unit which report to a Control Point.
Correction	A modification to historical information made by deleting or over-writing existing history, after which there will be no record of the prior information. The ability to process corrections is limited primarily to the UCPC.
Data Dissemination Operational Data Source (DDOS)	The Data Dissemination Operational Data Source is a UCPath product designed to populate information from HCM and Payroll software to the UC Data Warehouse.

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Decision Support Services (DSS)	Decision Support Services provides integrated, clean, timely, consistent, and documented data for reporting and analysis.
Defined Contribution Plan (DCP)	A defined-contribution plan is a retirement plan in which a certain amount or percentage of money is set aside each year by a company for the benefit of each of its employees. The Internal Revenue Code (IRC) limits the amount participants may contribute annually to tax-advantaged retirement plans such as a 403(b) and a 457(b) defined benefit plan imposing substantial penalties for violating contribution limits.
Delegated Authority	Delegated authority is authority that has been delegated to a role or an individual which authorizes that role or individual to approve the one-time additional pay.
Delegation of Transactions	Approver security role and row level security is inherited by a proxy.
Deny	Cancels the transaction and notifies the initiator and all approvers who have already approved the transaction.
Department Budget Table	UCPath records that store funding sources for earnings, employer-share deductions, and employer-share taxes, as well as for salary encumbrances. The tables are part of Commitment Accounting and are stored by Fiscal Year and HR Department.
Department Security Tree	Configured in UCPath for AWE routing. It mimics the current campus approval structure: Organization, Division, Sub-Division, Department and Sub-Department
Dependent Eligibility Management System (DEMS)	This is an online, third party vendor system that tracks, updates, and notates all communications that have taken place during the employee's family member eligibility verification process.
Derivation Indicator	This is a term used specifically in PPS for a data element that indicates whether the Retirement System Code and FICA Eligibility Code should be automatically derived by the system. In relation to PeopleSoft, derivation indicators would be equivalent to the FTE, EMPL Class, Appointment Duration, and FICA Flag fields used in Extension E-042 to automatically determine Retirement Coding.
Direct Retro (SCT)	Direct Retro is a PeopleSoft term for Salary Cost Transfer (SCT)
Division of Cost Allocation (DCA)	The Composite Benefit Rate Steering Committee worked with the Department of Health and Human Services – Division of Cost Allocation aka the DCA to establish a CBR methodology that is compliant with Federal regulations. Medical Center excluded, rates must be filed and negotiated with the DCA.