This course will help you understand how Effort Bearing and Non-Effort Bearing Summer Salary is calculated for Faculty at UCI and how the transactions are entered in UCPath.
Course Agenda

Lesson Topics

1. Effort Vs. Non-Effort Bearing
2. Summer Salary Worksheet
3. UCPath Summer Salary Entry
4. Summer Salary Use Cases

Next
Lesson 1

Effort Bearing vs. Non-Effort Bearing Summer Salary
Lesson 1 Objectives

In this lesson, you will learn how to:

- Understand the difference between Effort Bearing & Non-Effort Bearing Summer Salary
- Understand how Summery Salary is calculated and applied
- Recognize the different UCPath entry methods for each Summer Salary type
Position Management Overview

The Position Management module of UCPath is designed to maintain effective, dated history of all UC positions—filled and vacant.

- Link key data elements and facilitate hiring process.
- Define reporting hierarchy and organizational structure of a department.
- Tie employees to accounting chart fields that determine how labor costs are distributed.
- Use position data for organizational planning, recruitment, career planning and budgeting.
- When a position is vacated it should be evaluated based on the department’s overall budget; it can be inactivated or remain open if there are plans to refill it.

Key Benefits

Effort Bearing Summer Salary

Summer Salary that requires effort (FTE) to be tracked is considered “Effort Bearing”.

- **Example:** A faculty member performing research paid by a contract or grant that requires effort to be reported to the funding agency.
- **Or,** a school that wants to track all summer salary using FTE data.
Why are Positions Important?

- In UCPath a position is required to hire or rehire an employee or student.
- 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 are not allowed.
  - New positions must be created for all permanently budgeted positions.
  - Budget Office creates all Senate & Faculty Positions.

**Effort Bearing Calculation**

Effort Bearing Summer Salary is calculated based on **19 workings days** in a month.

- 19 working days = 1.0 FTE (Position)
- Additional days over 19 for Effort Bearing Summer Salary will require an additional / concurrent job.

**Academic Year Faculty** Summer Salary pay is based on 1/9\(^{th}\) of their annual salary.

- The number of days worked in the month will be divided by 19.
- The result will be set as the FTE value of the position.
When Appointment is Above 1.0 FTE

During the months of July and August, a Faculty employee’s percentage of time may go above 1.0 FTE.

- When a Faculty member is scheduled to be above 1.0 FTE because of Summer Salary, the overage should be added as an additional job (concurrent hire).
Dr. Brice is a faculty member at UCI School of Humanities & receives an annual salary of $130,000.00. He advised the Dean’s office he will be conducting research **21 days** in the month of July.

**Process Steps:**

1. Divide the number of days the faculty member will work by 19 (full Summer month):
   \[ 21 \div 19 = 1.1053 \]

2. The result of the equation (1.1053) represents the FTE value and will be split amongst two (2) positions.
   - First position with a 1.0 FTE
   - Second Position with a 0.1053 FTE
Once a person or student is hired, they are assigned a position and inherit the position attributes, which then generates job data.

**Job Attributes**

- Employee Class
- Academic duration of appointment
- Post Docs Anniversary Date
- Compensation (if applicable)
- Compensation Frequency
- Appointment End Date
- Probation End Date (Staff only)

Additional information is added at time of hire to complete the job record. Some job attributes are unique to Staff or Academic employees.

Managing Position FTE over the Summer

Faculty members who report effort during the summer will have FTE values that will fluctuate.

★ The Position FTE value of their summer job(s) should always reflect what the calculated FTE is for that Summer month.

**Things to Remember:**

- The Position FTE value should be updated via a PayPath Actions entry on the Position Data tab.
- A new Position & Job will be required if FTE increases above 1.0 FTE any Summer month.
Non-Effort Bearing Summer Salary

- Summer salary that does **not** require effort (FTE) to be tracked is considered “Non-Effort Bearing”.
- **Example**: Faculty who are given administrative summer ninths (i.e. chairs, associate deans, etc.)
When an employee is hired, or when there is a promotion or transfer, they are assigned a new position. All position attributes flow to job data; re-entry of data is not required. Incumbent history is stored in Job Data tables, which allows for the reporting of data. A position is static until there is a need to maintain it; that is, it is not updated until a change is necessary. Reclassifications and other position changes begin with an update to the position record. If the position is filled, the system automatically updates the incumbent’s job data.

Non-Effort Bearing Calculation

Non-Effort bearing Summer Salary is based on one summer ninths of the faculty member’s annual salary.

- When effort is not being tracked, the summer salary can be provided as Additional Pay via PayPath Actions entry on the faculty member’s current related job.
  - No additional position or job needs to be created.
After Local UCI approval, the template is sent to be processed by the UCPath Center and the new employee job record is generated in UCPath.

To create a “job” (hire an employee) the Department HR Initiator will use Smart HR Templates in UCPath.

Position Data and Smart HR Templates

For most New Hire and Rehire transactions, the HR Initiator must enter a Position Number (required field) into the Job Data tab of the template. Once the position is entered/selected, UCPath includes customizations to auto-populate certain position attributes into the template. Salary Admin Plan and Grade are identified during the position creation, but the Compensation Amount is identified on the SmartHR Template.

Non-Effort Bearing Example

Dr. Smith is the Department Chair at the School of Biological Sciences and is being compensated a summer ninth of her $180,000 annual salary.

Process Steps:

1. Divide the annual salary by 9
   - \$180,000 / 9 = \$20,000
2. The $20,000 would be paid as **Additional Pay** on their current Department Chair job. *(Additional Pay via PayPath Actions entry.)*
3. No additional / concurrent job is needed.
4. Additional Pay Effective Date & End dates should represent a full pay period *(1st – End of month)* to avoid unwanted pro-ratio.
Smart HR templates are customized so that position attributes default from the position number entered. Most fields that auto populate from the position number are grayed out indicating they are view only, including Business Unit, Department, Location Code, Job Code, and others.

---

**Lesson Summary:**

- Effort Bearing Summer Salary is considered work performed over the summer paid by a contract or by a grant that requires effort to be reported to the funding agency.
- Effort Bearing Summer Salary requires an additional job (concurrent hire).
- Effort calculated over 1.0 FTE in any Summer month requires another additional job.
- Non-Effort Bearing Summer salary does not require effort to be tracked & is paid as Additional Pay on their current related job.
Contingent Workers (CWR) are individuals who have a relationship with the University but do not receive pay from the University. (Examples include staff volunteers and visiting scholars).

Only Contingent Workers who supervise others are required to have a position; otherwise, they do not have positions. There are dedicated Smart HR Templates that are used to add CWRs with and without positions.

Positions for Contingent Workers

Please refer to Template Transactions training, or the Contingent Worker User Guide for additional information.
Lesson 2 Objectives

In this lesson, you will learn how to:

- Understand how Summery Salary is calculated and applied
- Learn how to fill out and submit the Summer Salary Worksheet
Summer Salary Worksheet Overview

- Review appointment details and determine whether the Summer Salary appointment is Effort or Non-Effort bearing.

- Summer Salary is always calculated in full months and the FTE will equate to the number of days the employee will work.
  - Example: Number of days worked in the month/19 = FTE for the month
  - FTE over 100% will require 2 jobs
Funding refers to the assignment of the account(s) that pays for a position's compensation.

Budgeting for positions involves departments estimating salary expenditures and comparing estimates with actual expenditures.

Take position funding and department budgets into consideration when creating a new position or updating an existing position. That is, determine whether the funding or budget also require updates.

When a position is vacated, it should be evaluated based on the department's overall budget; it can be inactivated or remain open if there are plans to refill it.

The **Summer Salary worksheet** will be used by department initiators to determine the Faculty’s Summer Salary amount.

---

### Summer Salary Worksheet 2021 (revised 4/12/21)

<table>
<thead>
<tr>
<th>Faculty Name:</th>
<th>Department:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID:</td>
<td>Title/Step:</td>
</tr>
<tr>
<td>Position #:</td>
<td></td>
</tr>
</tbody>
</table>

#### June 2021

<table>
<thead>
<tr>
<th>Su</th>
<th>M</th>
<th>T</th>
<th>W</th>
<th>Th</th>
<th>F</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Available Days: 8
- Job FTE for June: 0.2632

#### July 2021

<table>
<thead>
<tr>
<th>Su</th>
<th>M</th>
<th>T</th>
<th>W</th>
<th>Th</th>
<th>F</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>19</td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
</tr>
<tr>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Available Days: 17
- Job FTE for July: 0.2632

#### August 2021

<table>
<thead>
<tr>
<th>Su</th>
<th>M</th>
<th>T</th>
<th>W</th>
<th>Th</th>
<th>F</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
<td>21</td>
<td>22</td>
</tr>
<tr>
<td>23</td>
<td>24</td>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
</tr>
<tr>
<td>30</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Available Days: 22
- Job FTE for Aug: 0.0000

#### September 2021

<table>
<thead>
<tr>
<th>Su</th>
<th>M</th>
<th>T</th>
<th>W</th>
<th>Th</th>
<th>F</th>
<th>Sa</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>19</td>
<td>20</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Available Days: 13
- Job FTE for Sept: 0.0000
Lesson Complete

Lesson Summary:

- Position numbers are eight numeric characters and are auto generated by UCPath; there is no smart coding in the number.

- A position is required to hire or rehire an employee or student.
  - The Effective Date of the position must be prior to the Effective Date of the hire or rehire transaction.

- Positions can be maintained even when vacant.

- Employees are assigned to more than one position when they have more than one job.

- Positions are typically assigned to only one employee. Some positions can be multi-headcount positions, but there are many attributes that must be shared.

- Contingent Workers (CWR) who supervise others must be hired with a position. CWRs who do not supervise others are hired without a position.

---

Summer Salary Worksheet

Within the worksheet, click the small red corner markers to view additional information regarding the data requirements for that particular field.
Filling Out Summer Salary Worksheet

The eligible days for Summer Salary will be highlighted for each month of Summer along with the projected total FTE.

Identify the Month in which the Faculty member will be taking Summer Salary.
Identifying Concurrent Hire

If the faculty is performing Effort Bearing Summer Salary, select the **Conc Job** option on the Summer Salary worksheet.

<table>
<thead>
<tr>
<th>Month</th>
<th># of Days</th>
<th>Concurrent Job or Add'l Pay</th>
<th>FTE</th>
<th>UCPath Annual Rate</th>
<th>KFS Account</th>
<th>Fund's Annual Capped Rate (if applicable)</th>
<th>Cap Gap Amount (if applicable)</th>
<th>Amount to be Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>June</td>
<td>5</td>
<td><strong>Conc Job</strong></td>
<td>0.2632</td>
<td>$200,000</td>
<td>12345</td>
<td>$199,300</td>
<td>$1,477.34</td>
<td>$4,370.61</td>
</tr>
<tr>
<td>July</td>
<td>5</td>
<td><strong>Conc Job</strong></td>
<td>0.2632</td>
<td>$200,000</td>
<td>12345</td>
<td>$199,300</td>
<td>$1,477.34</td>
<td>$4,370.61</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Identify the number **working days** and identify if Summer Salary is a Concurrent Job or Additional Pay.

**FTE will be auto-calculated.**
When Summer Salary is identified as “Additional Pay” on the worksheet, the FTE field is not applicable and reduced to 0.
The `Add/Update Position Info` component is composed of five pages, which display information related to a specific position, such as job-related information, incumbent information (if one is assigned) and other position attributes.

### Add/Update Position Info Component

This example shows a position that had an upward job reclassification (JRU) after the position was initially created in UCPath.

Notice that there is more than one row of information for this position record. Historic and future-dated data appears when you select the **Include History** option.

Once you have entered all of the required data in each row, the worksheet will automatically calculate the amount the employee will receive in the "**Amount to be Paid**" column.

* **Capped Rate is taken into account** when calculating the amount to be paid.
Instructor Demo

Please follow along as the instructor performs a demonstration in the UCPath system.

After the demonstration is complete, feel free to pause the course to practice on your own by visiting the UPK Help site located in the Resources section of this course.

Search the UPK Help Site for "View Position Information"

---

### Summer Sal. Worksheet – Over-the-Cap

<table>
<thead>
<tr>
<th>Over the Cap Funding:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Month</td>
<td>Paid Over the Cap Amount</td>
</tr>
<tr>
<td>Summer Session amount (if applicable):</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Certifications/Approvals:

**Total Summer Salary Amount:** $8,741.23

With my signature below I certify that I am able to perform my administrative and/or research obligations on these funding sources.

Financial Analyst’s Signature

Unit Head or Director’s Signature Date

Faculty/PI’s Signature Date

---

The worksheet will calculate each row and project the total amount of Summer Salary to be paid to the faculty member.

Please consider any salary changes that may occur over the summer for accurate Summer Salary calculation.
Lesson Summary:

✓ Summer Salary is calculated in whole month increments (19 days each summer month.)
✓ The number of days worked each month will be used in the calculation to determine the FTE.
✓ If applicable, be sure to identify the fund’s capped rate.
1. Position Funding Audit Report: Used to identify & view positions that have active funding.


In the UCPath Decision Support section, there are three (3) dedicated Position reports that can be utilized at any time to find information.
Lesson 3 Objectives

In this lesson, you will learn how to:

- Enter Effort-Bearing Summer Salary Appointments in UCPath
- Enter Non-Effort Bearing Summer Salary Payments
- Understand the pre-requisites and data requirements for each type of Summer Salary entry.
Lesson Summary:

- Position information can be reviewed in UCPath through the Add/Update Position Component.
- Cognos Reports are available to provide additional HR & Financial activity information for Positions in each Department or School.
Course Summary

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

- Describe the Position Management module within UCPath.
- Explain the relationship between position data and job data.
- Find Position information in UCPath.
- Find Position information in a Cognos Report.

Effort Bearing Summer Salary Entry

Effort Bearing Summer Salary appointments are entered as additional jobs/appointments via a Concurrent Hire Smart HR Template in UCPath.

Key Notes:

- A Concurrent job will allow the departments to assign a separate Researcher title/position to the faculty member and set the compensation based on the current pay in their existing/related job.
- The compensation for Summer Salary must be calculated first and then converted into an FTE value.
  - The FTE is entered on the position.
Position Management

Please determine if there is an existing position with the appropriate job code in your department before creating a new one.

- HR Initiators can use the **Position Summary** page in UCPath to view open (*vacant*) and filled positions for any departments they have security access to.
- New Positions created for Summer Salary must have an FTE value that reflects the true effort for that month. The FTE value can subsequently be changed via a PayPath Action for proceeding months.

**Navigation:** PeopleSoft Menu > Organizational Development > Position Management > Review Position/Budget Info > Position Summary
Position Management

It is important to review Position details before entering the Position number on the Smart HR Template.

- Certain position details may need to be updated prior to submitting a concurrent hire template. This will help ensure data accuracy in order to achieve and reflect the desired job record for the employee upon hire.

- **Position Details to review:**
  - Effective Date of Position
  - FTE
  - Reports-To Position (Supervisor)
  - Department ID
  - Salary Admin Plan
New Position Effective Date

If a new position needs to be created, please ensure the effective date of the Position is at least 30 days prior to the start of the faculty’s summer salary.

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

Please refer to the **AP website** for the current salary scales to view the appropriate Salary Admin plans for Summer Salary appointments.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Years at Step</th>
<th>Adjusted Scale 7/1/2018</th>
<th>Adjusted Scale 10/1/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assistant Professor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant Researcher</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant Professor of Teaching</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 3 (e.g., 001303, 003225, 001581)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant Professor</td>
<td>I  2</td>
<td>62,700</td>
<td>68,100</td>
</tr>
<tr>
<td></td>
<td>II 2</td>
<td>66,600</td>
<td>70,100</td>
</tr>
<tr>
<td></td>
<td>III 2</td>
<td>70,200</td>
<td>73,000</td>
</tr>
<tr>
<td></td>
<td>IV 2</td>
<td>74,200</td>
<td>78,100</td>
</tr>
<tr>
<td></td>
<td>V 2</td>
<td>78,000</td>
<td>82,300</td>
</tr>
<tr>
<td></td>
<td>VI 2</td>
<td>82,100</td>
<td>86,600</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6,966.67</td>
<td>7,344.44</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7,400.00</td>
<td>7,788.89</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7,800.00</td>
<td>8,211.11</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8,244.44</td>
<td>8,677.78</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8,666.67</td>
<td>9,144.44</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9,122.22</td>
<td>9,622.22</td>
</tr>
<tr>
<td>Associate Professor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Researcher</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Professor of Teaching</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 2 (e.g., 001203, 003215, 001608)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I  2</td>
<td>76,100</td>
<td>82,400</td>
</tr>
<tr>
<td></td>
<td>II 2</td>
<td>82,200</td>
<td>86,700</td>
</tr>
<tr>
<td></td>
<td>III 2</td>
<td>86,400</td>
<td>91,100</td>
</tr>
<tr>
<td></td>
<td>IV 3</td>
<td>91,600</td>
<td>96,500</td>
</tr>
<tr>
<td></td>
<td>V 3</td>
<td>98,700</td>
<td>104,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8,677.78</td>
<td>9,155.56</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9,133.33</td>
<td>9,633.33</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9,600.00</td>
<td>10,122.22</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10,177.77</td>
<td>10,722.22</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10,966.67</td>
<td>11,555.56</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10,168.89</td>
<td>10,733.33</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10,977.78</td>
<td>11,568.67</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11,811.11</td>
<td>12,455.86</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12,677.78</td>
<td>13,377.78</td>
</tr>
<tr>
<td></td>
<td></td>
<td>13,611.11</td>
<td>14,368.67</td>
</tr>
</tbody>
</table>
Submit Concurrent Hire (Effort Bearing)

For Effort Bearing Summer Salary appointments please select the UC_CONC_Hire_AC template with the Effective Date reflecting the first day of the month the Faculty member will begin Summer Salary.

- Template Reason Code: Academic Concurrent Hire

Note: For additional information on submitting a SmartHR Template for a Concurrent Hire, please refer to TEM104: Concurrent Hire training in UCLC, or view the step-by-step UPK simulation for “Initiate Concurrent Hire Template Transaction (Academic)”.
Compensation & Earnings Distribution

- Enter the faculty’s annual salary (including any off-scale amount) by selecting the corresponding Step. The Job Compensation fields will auto populate with the Scale Salary. You must add another row for any Off-Scale amounts and manually enter the dollar amount.

- If Faculty has NSTP, add an additional row to add the UCGCYN Comp Rate code and corresponding dollar amount.

- UCPATH will utilize the Position FTE to calculate the amount to pay.

---

Job - Salary Plan

<table>
<thead>
<tr>
<th>Salary Administration</th>
<th>Plan</th>
<th>Salary Grade</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>T001</td>
<td></td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Job Compensation - Pay Components

| UCANNL     | 104000 000000 | A            | Salary Step |
| UCOFF1     | 250000 000000 | B            | Manual      |
Compensation & Earnings Distribution

- Do **NOT** enter data in the Earnings Distribution (JED) tab on the Smart HR Template, only click Save & Submit.
  - Earnings Distribution will be entered as a PayPath Action once the template has been completed by the UCPath Center.
  - It takes up to 24 hours for UCPath to properly assign pay group.
  - Entering Earnings Distribution on the hire template will cause wages to be charged to the department’s suspense account.
The Approval Workflow Processing time for Smart HR Templates could take 3-7 days to complete at the UCPath Center.

- Please Plan accordingly and ahead of time when possible.
Adding Earnings Distribution Details

After the concurrent hire has been completed at the UCPath Center, submit a PayPath Action on the Job Data tab to add Earnings Distribution data for Summer Salary.

1. **Effective Date** should reflect first day of the month of when Faculty’s Summer Salary starts.
2. **Reason**: JED / **Action Reason**: JED
3. **Earnings Distribution Type**: By Percent
4. **Distribution % field should equal 100% (100.00)**
   - If using more than one Earn Code, distribution should be combined to reach 100%
## All Eligible Earn Codes for Summer Salary

The following EARN codes in UCPath can be used to identify various types of Summer Salary earnings.

- For more information, please refer to the [DOS Codes to ERN Codes](#) job aid.

<table>
<thead>
<tr>
<th>EARN Code</th>
<th>Description</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACR</td>
<td>Additional Comp-Research</td>
<td>(Used for appropriate research or professorial titles for research.) Used for all eligible academic-year faculty who are performing research over the summer. For AY academic appointees eligible for the employer/employee 403(b) contribution on summer salary.</td>
</tr>
<tr>
<td>ACA</td>
<td>Additional Comp-Admin</td>
<td>(Used with appropriate administrative titles for service.) Used for all eligible academic-year faculty who serve in an administrative capacity (e.g., Chair) during the summer. For AY academic appointees eligible for the employer/employee 403(b) contribution on summer salary. Most likely non-effort bearing.</td>
</tr>
<tr>
<td>AFR</td>
<td>Additional Comp-FY Research</td>
<td>(FY Appointees) Used for exceptional payment of one-twelfth of annual salary for FY academic appointees for research performed concurrent with vacation usage; appropriate number of accrued vacation days must be charged. For fiscal year academic appointees – FY are NOT eligible for the employer/employee 403(b) contribution on summer salary.</td>
</tr>
</tbody>
</table>
Unpaid Cap Gap Processing

If the Department will not be paying the salary cap gap - enter the percentage of the annual salary amount that should **not** be paid using the GAP earn code in the **Earnings Distribution** section (Job Data tab in PayPath Actions):

![Earnings Distribution Screen]

- **Action:** JED
- **Action Reason:** JED

**Earnings Distribution:** By Percent

Enter a new row to identify GAP Earn code & Distribution %
Capped Funds & Summer Salary

The **Multiple Components of Pay (MCOP)** Worksheet on the Funding Entry Page in UCPath is required to be filled for Faculty that are paid from capped funds.

- The current DHHS Annual Salary Cap is **$199,300 (2021)**.
- **Monthly Rate:** $16,608.33 (FY)

*Note: For additional information on entering Multiple Components of Pay, please refer to the MCP301: Campus MCOP in UCLC.*
Retroactive Concurrent Hire Entries

SmartHR Hire Templates that are submitted and approved AFTER a pay period has closed will require an Off-Cycle Payroll request to be submitted if the employee does not get paid.

- The UCPPath system will NOT automatically pay employees who have been hired into a new job if the SmartHR Hire Template is not approved by the Payroll Calendar deadline.

- All pay impacting transactions are subject to the Payroll Calendar deadlines.

- For more information, please view the Payroll Processing Schedule job aid.
Retro Dated FTE Changes

Please note that Retro Dated Position FTE changes will **not** trigger automatic pay adjustments on the next on-cycle check.

A. If the FTE change should have resulted in an **increase** to faculty pay, submit an Off-Cycle payroll request for any wages owed.

B. If the FTE change should have resulted in a **decrease** in pay, you will have to submit an Overpayment Payroll Request.
Non-Effort Bearing Entry in UCPath
Non-Effort Bearing Summer Salary

Faculty who perform “Non-Effort Bearing” Summer Salary are eligible to receive **Additional Compensation** under their current related job record.

- Non-Effort Bearing Summer Salary is entered as **Additional Pay** via PayPath Actions *(Additional Pay Data tab).*
- The amount to pay would have to be calculated using the Summer Salary Worksheet.
- **Additional Pay transactions do not require additional UCPath Center Approval.**
Submitting Additional Pay

- Navigate to PayPath Actions and search for the employee.
  - Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > PayPath Actions
- Click on the Additional Pay Data tab to begin entering payment details.
Additional Pay Details

When entering Additional Pay please identify the following:

1. Earn Code for the Additional Pay
   - Example: ACR, ACA
2. Effective Date & End Date
   - Dates entered should reflect a FULL pay period (1st – End of Month).
3. Pay Period Amount: Amount to be paid to Faculty on next on-cycle check.
4. Goal Amount (Optional): Total amount to pay
Here is an example of how **Additional Pay for Non Effort Bearing** Summer Salary would be entered for an Associate Dean performing administrative work from June to July.

**Note:** PLEASE UNCHECK! THE PRORATE BOX.
Retro Dated Additional Payments

Additional Pay transactions approved **AFTER** the pay period has closed will be paid out on the **next** On-Cycle paycheck.

- Off-cycle Payroll Requests cannot be submitted for missed additional payments.
- Please feel free to submit an EEC ticket if additional assistance is required.

- All pay impacting transactions are subject to the Payroll Calendar deadlines.
  - For more information, please view the Payroll Processing Schedule job aid.
Funding Entry Reminders

- If the Additional Pay for Summer Salary is paid from different / various department KFS accounts, or a Grant, please ensure it is identified correctly on the Funding Entry page for that position. It is possible that a new funding row may be required.

- Funding can be assigned by earn code. Accounts must have a combined distribution amount that equals 100% per Earn Code. Failure to identify the correct account for the Earn Code may result in the Department Default/Suspenese Account to be charged.
Lesson Summary:

- Effort Bearing Summer Salary requires a **UC_CONC_HIRE_AC** template to be submitted to add the additional job.
- Please refer to the AP Website to view current salary scale for Salary Admin Plans.
- Earnings Distribution should **ONLY** be entered via a PayPath Action update in the Job Data tab, never on the hire template.
- Non-Effort Bearing Summer Salary is entered as an Additional Pay transaction via PayPath Actions on the faculty’s current / related job.
UCI UCPath

Lesson 4

Summer Salary Use Cases

Continue
Lesson 4 Objectives

In this lesson, you will learn how to:

- Understand and recognize various scenarios for effort and non effort bearing summer salary appointments.
Use Case A: Effort Bearing Summer Salary

- Professor Smith’s annual professorial salary is $270,000.
- She will be performing 4 days of research on a grant.
- Calculation: $270,000 / 9 = $30,000.00 = summer salary monthly rate
- The Summer Salary will be entered as an additional job / concurrent hire.
- Review Position details before starting template.
- Do not enter JED on the hire template, instead, process a PayPath Action to update the Earning Distribution after the Hire Template has been processed.
Use Case B: Non-Effort Bearing Summer Sal.

- Department Chair Green’s annual professorial salary is $90,000.
- His agreement will pay him $90,000/9 = $10,000.00 = summer salary monthly rate.
- The Summer Salary will be entered as an Non-Effort Bearing additional pay on his Chair position.
Use Case C: Specific Dollar Amount

- Assistant Professor Earle would like to pay herself $6,064.32 on her grant for July.
- Her professorial annual rate is $80,400.
- $80,400/9 = $8,933.33 = summer salary monthly rate
- $6,064.32/$8,933.33 = .6789. This falls between 12 and 13 days on the academic year daily time factor.
- To get the exact amount that will be paid, multiply .6789 by $8,933.33, which equals $6,064.32.
- To figure out the number of days in the Summer Month, multiply .6789 by 19 = 12.898.
- Input 12.898 days on the Summer Salary worksheet (to verify “Amount to be Paid”).
UCI UCPath

Online Course Resources
Where to Get Help

- The **UCI UCPaht** website is your first line of support for all UCPaht related questions.

- Use the **Search** feature to find conceptual content, job aids or step-by-step instructions for UCPaht tasks.

- You may also find things like:
  - FAQs
  - Training presentations
  - Lessons learned recordings
  - And more!
If you need additional assistance regarding UCPPath or transactions, you may contact your School/Division Point of Contact (POC) for direct support.
If you are still experiencing issues, or have unanswered questions about transactions, please 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 SSL301: Summer Salary presentation.