

UCI UCPath

UCPath
Training

SSL301:
Summer Salary

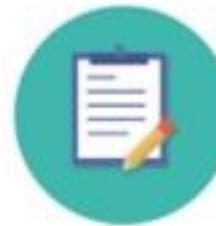
Start



About This Course

- ❖ 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

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UCI UCPath

Lesson 1



**Effort Bearing vs. Non-
Effort Bearing Summer
Salary**

Continue



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

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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.



Next

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 $1/9^{\text{th}}$ 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).

Effort Bearing Summer Salary Example



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 FT

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.)



Next

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.

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-ration.

Next



Lesson Complete

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.



Lesson 2



Summer Salary Worksheet

Continue



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

Next

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

Summer Salary Worksheet

- 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)

Faculty Name: _____
Employee ID: _____
Position #: _____

Department: _____
Title/Step: _____
Total # of Days: 10

June 2021						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
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			

July 2021						
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

August 2021						
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				

September 2021						
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: 8

Available Days: 17

Available Days: 22

Available Days: 13

Job FTE for June: 0.2632

Job FTE for July: 0.2632

Job FTE for Aug: 0.0000

Job FTE for Sept: 0.0000

Month	# of Days	Concurrent Job or Add'l Pay		UCPath Annual Rate		KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
		FTE	Annual Rate						
June	5	Conc Job	0.2632	\$200,000			\$199,300	\$1,477.34	\$4,370.61
July	5	Conc Job	0.2632	\$200,000			\$199,300	\$1,477.34	
			0.0000						

Next

Summer Salary Worksheet

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

Summer Salary Worksheet 2021 (revised 4/12/21)							
Faculty Name:				Department:			
Employee ID:				Title/Step:			
Position #:				Total # of Days:	10		
June 2021							
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				
July 2021							
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	
August 2021							
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					
September 2021							
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:	8	Available Days:	17	Available Days:	22	Available Days:	13
Job FTE for June:	0.2632	Job FTE for July:	0.2632	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	Enter the total annual salary for the faculty member [includes scale salary (UCANNL), off-scale (UCOFF1), above scale (UCABVE), NSTP (UCGCYN), etc., does not include additional pay]. Do not enter any agency capped rate here. Capped rates are addressed in position funding, not on the job.		
June	5	Conc Job	0.2632	\$200,000			
July	5	Conc Job	0.2632	\$200,000			
			0.0000				
			0.0000				

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.

12/21)

Employee ID:
Position #:

Department:

Title/Step:

Total # of Days: 10

June 2021						
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: 8

Job FTE for June: 0.2632

July 2021						
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

Available Days: 17

Job FTE for July: 0.2632

August 2021						
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				

Available Days: 22

Job FTE for Aug: 0.0000

September 2021						
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: 13

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
June	5	Conc Job	0.2632	\$200,000	12345	\$199,300	\$1,477.34	\$4,370.61
July	5	Conc Job				\$199,300	\$1,477.34	\$4,370.61

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

Next

Identifying Concurrent Hire

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

Available Days:		8	Available Days:		17	Available Days:		22	Available Days:		13
Job FTE for June:		0.2632	Job FTE for July:		0.2632	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
June	5	Conc Job	0.2632	\$200,000	12345	\$199,300	\$1,477.34	\$4,370.61
July	5	Conc Job	0.2632	\$200,000		\$199,300	\$1,477.34	\$4,370.61
			0.0000					\$0.00
			0.0000					\$0.00



Summer Salary Worksheet Details

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

Faculty Name:
Employee ID:
Position #:

Identify the number working days and identify if Summer Salary is a Concurrent Job or Additional Pay.

Department:
Title/Step:
Total # of Days:

Enter the Faculty Member's Annual Salary, the KFS account used to Pay Summer Salary, the Capped Rate. The Cap Gap Amount will be auto-calculated (if applicable).

June 2021						
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			

**FTE will be auto-calculated.

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
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

Available Days:

Job FTE for June:

Available Days:

Job FTE for July:

August 2021						
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				

Available Days:

Job FTE for Aug:

September 2021						
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:

Job FTE for Sept:

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath		KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
				Annual Rate					
June	5	Conc Job	0.2632	\$200,000		12345	\$199,300	\$1,477.34	\$4,370.61
July	5	Conc Job	0.2632	\$200,000			\$199,300	\$1,477.34	\$4,370.61
			0.0000						
			0.0000						

Next

Summer Salary Worksheet Details II

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

Faculty Name: _____
Employee ID: _____
Position #: _____

Department: _____
Title/Step: _____
Total # of Days: 10

When Summer Salary is identified as "Additional Pay" on the worksheet, the FTE field is not applicable and reduced to 0.

20	21	22	23	24	25	26
27	28	29	30			

Available Days: 8

Job FTE for June: 0.0000

July 2021

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

Available Days: 17

Job FTE for July: 0.0000

August 2021

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				

Available Days: 22

Job FTE for Aug: 0.0000

September 2021

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: 13

Job FTE for Sept: 0.0000

Month	# of Days	Concurrent		UCPath Annual Rate	KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
		Job or Add'l Pay	FTE					
June	5	Addl Pay	0.0000	\$200,000	12345	\$199,300	\$1,477.34	\$4,370.61
July	5	Addl Pay	0.0000	\$200,000		\$199,300	\$1,477.34	\$4,370.61
			0.0000					\$0.00

Summer Salary Worksheet Details III

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

Faculty Name: _____
Employee ID: _____
Position #: _____

Department: _____
Title/Step: _____
Total # of Days: 10

June 2021						
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: 8

Job FTE for June: 0.2632

July 2021						
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

Available Days: 17

Job FTE for July: 0.2632

August 2021						
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				

Available Days: 22

Job FTE for Aug: 0.0000

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

26 27 28 29 30

Available Days: 13

Job FTE for Sept: 0.0000

Month	# of Days	Concurrent Job or Add'l Pay	FTE	UCPath		KFS Account	Fund's Annual Capped Rate (if applicable)	Cap Gap Amount (if applicable)	Amount to be Paid
				Annual Rate					
June	5	Conc Job	0.2632	\$200,000		12345	\$199,300	\$1,477.34	\$4,370.61
July	5	Conc Job	0.2632	\$200,000			\$199,300	\$1,477.34	\$4,370.61
			0.0000						\$0.00
			0.0000						\$0.00

Amount to be Paid
\$4,370.61
\$4,370.61
\$0.00
\$0.00

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

Summer Sal. Worksheet – Over-the-Cap

Towards the bottom of the spreadsheet, identify the **Paid** vs. **Unpaid** Cap amounts.

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):

\$66,666.67

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

Date

Faculty/PI's Si

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

/Unit Head or Director's Signature

Date

's Signature

Date

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

Next



Lesson Complete

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.

UCI UCPath

Lesson 3



UCPath Summer Salary Entry

Continue



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.

Next

Effort Bearing Entry in UCPPath



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.

Next

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

The screenshot shows the PeopleSoft Position Management interface. On the left, a 'Search Results' table lists positions with numbers 40281795, 40281804, 40281997, 40282028, 40282079, 40282173, and 40282179, all described as 'LECT-MISCELLANEOUS/PA'. The 'Position Number' column is highlighted with a red box. In the center, the 'Position Summary' page allows searching by various criteria like Position Number, Description, and Status. The 'Position Status' dropdown is set to 'Filled'. The 'Business Unit', 'Department', and 'Job Code' fields are also highlighted with a red box. On the right, a table displays the current headcount for different status categories: Open (0 out of 1), Filled (1 out of 1), and another Filled entry (1 out of 1). A yellow 'Next' button is at the bottom right of the table.

Position Number	Description
40281795	LECT-MISCELLANEOUS/PA
40281804	LECT-MISCELLANEOUS/PA
40281997	LECT-MISCELLANEOUS/PA
40282028	LECT-MISCELLANEOUS/PA
40282079	LECT-MISCELLANEOUS/PA
40282173	LECT-MISCELLANEOUS/PA
40282179	LECT-MISCELLANEOUS/PA

Position Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Position Number: begins with

Description: begins with

Position Status: Filled

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

Case Sensitive

Search Basic Search

Position Number	Headcount	Status	Current Headcount
Open	0	out of 1	
Filled	1	out of 1	
Filled	1	out of 1	
Filled	1	out of 1	
Open	0	out of 1	
Open	0	out of 1	

First 1-100 of 125

Next

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.

PROFESSOR SERIES - REGULAR SCALES

ACADEMIC YEAR - ONE NINTH*

SUMMER RESEARCH**

Salary Admin Plan: Professor and Researcher T001, Professor of Teaching T01L

Rank	Step	Step	Adjusted Scale*** 7/1/2018		Adjusted Scale*** 10/1/2019	
			Annual	Monthly (1/9)	Annual	Monthly (1/9)
ASSISTANT PROFESSOR	I	2	62,700	6,966.87	68,100	7,344.44
ASSISTANT RESEARCHER	II	2	66,600	7,400.00	70,100	7,788.89
ASSISTANT PROFESSOR OF TEACHING	III	2	70,200	7,800.00	73,900	8,211.11
Grade 3 (e.g., 001303, 003225, 001681)	IV	2	74,200	8,244.44	78,100	8,677.78
	V	2	78,000	8,666.67	82,300	9,144.44
	VI	2	82,100	9,122.22	86,600	9,622.22
ASSOCIATE PROFESSOR	I	2	76,100	8,677.78	82,400	9,155.56
ASSOCIATE RESEARCHER	II	2	82,200	9,133.33	86,700	9,633.33
ASSOCIATE PROFESSOR OF TEACHING	III	2	86,400	9,600.00	91,100	10,122.22
Grade 2 (e.g., 001203, 003215, 001608)	IV	3	91,600	10,177.78	96,500	10,722.22
	V	3	96,700	10,966.67	104,000	11,555.56
PROFESSOR	I	3	91,700	10,188.89	96,600	10,733.33
RESEARCHER	II	3	96,800	10,977.78	104,100	11,588.87
PROFESSOR OF TEACHING	III	3	106,300	11,811.11	112,100	12,455.56
Grade 1 (e.g., 001103, 003205, 001604)	IV	3	114,100	12,677.78	120,400	13,377.78
	V	--	122,500	13,611.11	129,300	14,388.87

Next

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**

Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template

1 Transaction Type All
2 Select Template UC_CONC_HIRE_AC

Effective Date 06/01/2021

Academic Concurrent Hire/Inter Location Transfer

3 Transaction Type All Refresh

Transactions in Progress

You do not have any transactions in progress.

Go To Transaction Status

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 \(Academic\)"](#).

Next

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			
Salary Administration		Salary Grade	
T001 Plan		2	
Step 5			
Job Compensation - Pay Components			
Comp Rate Code	Compensation Rate	Compensation Frequency	Rate Code Source
1 UCANNL	104000.000000	A	Salary Step
2 UCOFF1	26000.000000	B	Manual
Job Compensation - Payroll Currency and Frequency			
*Compensation Frequency		UC_9M	

Next

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 screenshot shows a portion of a Smart HR Template interface. At the top, there are tabs for 'Personal Data', 'Job Data', and 'Earnings Dist'. Below these, under 'Employee Information', is a section for 'Job Earnings Distribution Type'. It includes a dropdown for 'Earnings Distribution Type' set to 'None' and a field for 'Aggregate Comp Rate'. A large red 'X' is overlaid on the entire 'Job Earnings Distribution' table below. The table has columns for 'Earnings Code', 'Compensation Rate', and 'Percent of Distribution'. At the bottom of the template, there are buttons for 'Save and Submit' (which is highlighted with a red box), 'Save for Later', 'Cancel', and 'Supporting documents'. To the right, there are navigation buttons for 'First', 'Last', and '2 of 2'. A yellow 'Next' button is located in the bottom right corner of the screenshot area.

Template Transaction Processing

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.

Previous Data Job Data Additional Pay Data

Kermed Record Employee Email ID: 10288691 Email Record: 1

Academic Faculty HR Status: Active Payroll Status: Active

1 Date Effective Date: 06/01/2017 (100.00)

2 Action: JED / Earnings Distribution Change Action Reason: JED / Regulated Compensation Plans

Effective Sequence: 0

Current Effective Date: 12/01/2016 Current Eff Sequence: 3

Position Number: 40288421 Current Action: 27A Current Action Reason: JED Data Change Benefit: Dates Eligible

Business Unit: UCDSP

Department: 40331

Location Code: C-0128

Job Code: 301000

Union Code: 40

Reports To Position Number: 40288008

PLA Status: Current

Salary Administration Plan: T001

Salary Grade: 3

FTE: 1.000000

Appointment End Date: (100.00)

3 Earnings Distribution Type: Earnings Distribution

Cmp Rate: \$1,000.0000 Standard Hours: 40.00 Pay Frequency: 100% (100.00)

Pay Components

Rate Code	Cmp Rate	Personalized Pay	Pay Type	Value	Unit
1 UCDSP	\$1,000.0000	Annual	100	00	00
2 UCDSPY	\$0.000000	Annual	000	00	00

4 Earnings Distribution

Earnings Code	Cmp Rate	Personalized Pay	Pay Type	Value	Unit
1 ADR	\$0.000000	100.0000	100	00	00
2 Additional Comp Research	\$0.000000	000.0000	000	00	00

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

Next

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](#).

EARN Code	Description	Detail
ACR	Additional Comp-Research	(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.
ACA	Additional Comp-Admin	(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.
AFR	Additional Comp-FY Research	(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.

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*):

Job Data		Action: JED / Q Earnings Distribution Change	
Effective Date: 04/01/2018		Action Reason: JED / Q Negotiated Compensation Plans	
Effective Sequence: 1		Current Action: CTA	Data Change
Current Effective Date: 03/01/2018		Current Action Reason: CMV	CMV Conversion rate
Current Eff Sequence: 1			
Position Number: 40234801	ASSOC PROF-A/Y		
Business Unit: RCMP	UC Irvine Campus		
Department: 100001	COGNITIVE SCIENCES		
Location Code: C-0140	SOC/ABN/SCI		
Job Code: 001208	ASSOC PROF-A/Y		
Union Code: A0	Academic Senate - Irvine		
Reports To Position Number: 40236246	PROF-A/Y 10043201 Faculty Guards		
FLSA Status: Exempt			
Salary Administration Plan: T001	Establishment ID: UC	UC Irvine	
Salary Grade: 2	Hip:	4/3	
FTE: 1.00000	Employee Class: 0	Academic Faculty	
Appointment End Date: 06/30/2018	Exit Job Automatically:	<input type="checkbox"/>	
Earnings Distribution Type: By Percent <input type="button" value="▼"/>		Comp Rate: 8,241.870000	Standard Hours: 40.00
			Pay Frequency: 00012 / Q UC 8/12 - AF
Pay Components			
Rate Code: 1 UCANNL	Comp Rate: \$1,800.000000	Personalize: <input type="checkbox"/>	Find: <input type="checkbox"/> 1 of 2 / Last
2 UCOFF1	10 19,300.040000	Compensation Frequency: <input type="checkbox"/>	<input type="checkbox"/>
Annual		Annual	
Earnings Distribution			
Percentage Code: 1 ACR	Comp Rate: 8,891.260000	Personalize: <input type="checkbox"/>	Find: <input type="checkbox"/> 1 of 2 / Last
2 GAP	10 2,315.417500	Individual %: <input type="checkbox"/>	<input type="checkbox"/>
		75.000	
		(25.000)	

Action: JED
Action Reason: JED

**Earnings
Distribution: By
Percent**

Enter a new row to
identify GAP Earn
code &
Distribution %

Next

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.

Salary Cap



- 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 UCPATH 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.

Position Data		Job Data		Additional Pay Data	
Employee		Empl ID: 1		Empl Record: 1	
New Additional Pay		Find View All		Find 1 of 1 Last	
Earnings Code: <input type="text" value="00"/>		Find View All		Find 1 of 1 Last	
Effective Date: <input type="text" value="08/01/2021"/>		Find View All		Find 1 of 1 Last	
Effective Date: <input type="text" value="08/01/2021"/>		Find View All		Find 1 of 1 Last	
Payment Details		Find View All		Find 1 of 1 Last	
Add: Seg A: <input type="text" value="1"/>		Find View All		Find 1 of 1 Last	
End Date: <input type="text" value="08/31/2021"/>		Reason: <input type="text" value="Not Specified"/>		Find View All	
Pay Period Amt: <input type="text" value="35,322.32"/>		Goal Amount: <input type="text" value="0"/>		Goal Balance: <input type="text" value="0"/>	
Goal Amount: <input type="text" value="0"/>		Goal Balance: <input type="text" value="0"/>		<input type="checkbox"/> OK to Pay	
<input type="checkbox"/> Prorate Additional Pay		Applies To Pay Periods		<input type="checkbox"/> First <input type="checkbox"/> Second <input type="checkbox"/> Third	
<input type="checkbox"/> First <input type="checkbox"/> Second <input type="checkbox"/> Third					
Job Information					
Employee Type: <input type="text" value="Dataset"/>		Standard Hours: <input type="text" value="40.00"/>			
Compensation Rate: <input type="text" value="38,825.000000"/>		Frequency: <input type="text" value=""/>			
Default Job Data					
Position: <input type="text" value="ASSOC PROF-AY"/>					
Business Unit: <input type="text" value="RCMP"/>		UC Intra Campus			
Department: <input type="text" value=""/>					
Job Code: <input type="text" value="001200"/>		ASSOC PROF-AY			
FTE: <input type="text" value="1.000000"/>					
Employee Status: <input type="text" value="Active"/>		Expected Job End Date: <input type="text" value=""/>			
<input type="button" value="Save for Later"/>		<input type="button" value="Save And Submit"/>		<input type="button" value="Cancel"/>	
<input type="button" value="Upload / View Supporting Documents"/>					

Next

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

The screenshot shows the 'New Additional Pay' form. Step 1 highlights the 'Earnings Code' field (ACR) and the 'Effective Date' field (07/01/2021). Step 2 highlights the 'Payment Details' section, including 'Addl Seq #', 'End Date', and 'Reason'. Step 3 highlights the 'Pay Period Amt' field. Step 4 highlights the 'Goal Amount' field and the 'Goal Balance' label. The 'Applies To Pay Periods' section at the bottom is also visible.

New Additional Pay

Find | View All First 1 of 1 Last

1 *Earnings Code: ACR Additional Comp-Research

Effective Date

Find | View All First 1 of 1 Last

2 *Effective Date: 07/01/2021

Payment Details

Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: Reason: Not Specified

3 Pay Period Amt:

4 Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Additional Pay Example

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.

New Additional Pay

*Earnings Code:	ACA	Find View All	First	1 of 1	Last
Additional Comp-Admin					
Effective Date	06/01/2021	Find View All	First	1 of 1	Last
*Effective Date:	06/01/2021	Find View All	First	1 of 1	Last
Payment Details					
Addl Seq #:	1	Reason:	Not Specified		
End Date:	07/31/2021	Goal Amount:	10,000.00		
Pay Period Amt:	\$5,000.00	Goal Balance:			
Goal Amount:	10,000.00	Goal Balance:			
<input type="checkbox"/> Prorate Additional Pay					
Applies To Pay Periods					
<input checked="" type="checkbox"/> First <input type="checkbox"/> Second <input type="checkbox"/> Third					

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/Suspense Account to be charged.





Lesson Complete

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.

Next

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.

Next

Use Case B: Non-Effort Bearing Summer Sal.



- Department Chair Green's annual professorial salary is \$90,000.
- His agreement will pay him 1/9th Summer salary for his service as chair.
- Calculation: $\$90,000/9 = \$10,000.00$ = 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").

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
June	12.9	Conc Job	0.6788	\$80,400				\$6,064.32
			0.0000					\$0.00

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Online Course Resources

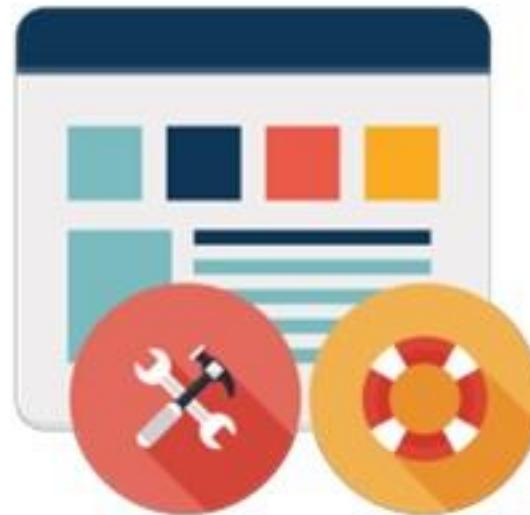


Next



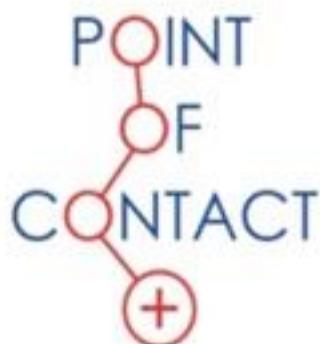
Where to Get Help

- The [**UCI UCPath**](#) website is your first line of support for all UCPath related questions.
- Use the **Search** feature to find conceptual content, job aids or step-by-step instructions for UCPath tasks.
- You may also find things like:
 - *FAQs*
 - *Training presentations*
 - *Lessons learned recordings*
 - *And more!*



Next

Point Of Contact



If you need additional assistance regarding UCPPath or transactions, you may contact your School/Division Point of Contact (POC) for direct support.

Next

Employee Experience Center



VISIT THE
**Employee
Experience
Center**

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

Next



Thank You!

This concludes the SSL301: Summer Salary presentation.