About this Course

Critical Concept Training & Resources

Today’s training session includes:

• The concepts of PayPath Actions

• The who, what, why, when, where, & how of the various actions processed in PayPath/UCPath

• Learning about all the resources available to you, including Job Aids, people, and UCPath itself

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Introductions & Classroom Logistics

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

Attendees
- Name
- University role
- Years at UC
- Expectations for this training

Safety and Housekeeping
- Emergency evacuation procedures
- Restrooms
- Course duration: 4 hours
- Breaks

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

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- Introductions & Logistics

Template Transactions
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- PayPath Transactions
- Classroom Etiquette

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Questions & Parking Lot

Questions

We encourage burning questions*. More than likely someone else in the room has the same burning questions.

- Please stop us and ask. Feel free.
- There is a lot of terminology. We use terms you will not understand.
- Let the instructors provide the answers.

Parking Lot

- Questions we can't answer right away
- Questions requiring a lengthy response
- Questions beyond the scope of this training

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Variety of experiences...

- Work mostly with Staff
- Work mostly with Academics
- Work with both Staff & Academics
- Long-time employee
- New employee
The UCPath System
Types of UCPath Transactions

- **Position Requests** - Use the Position Request Control Form for:
  - Requesting a new position
  - Updating a vacant position
  - Requesting / updating a multi-head count position

- **Smart HR Templates** are for employee onboarding and off-boarding: - Use Smart HR Templates for:
  - Hiring
  - Rehiring
  - Intra-Business Unit Transfers (within campus)
  - Inter-Business Unit Transfers (between campuses)
  - Termination
  - Retirement

- **PayPath** for employee maintenance – Use PayPath for:
  - Position Updates (filled positions only)
  - Job Data Updates
  - Additional Pay (Stipends, etc.)
Initiating & Approving PayPath Transactions

Non-student Academics

Job Data Change
- Initiator: AP
- Approver: AP

Short Work Break
- Initiator: AP
- Approver: AP

Additional Pay Recurring/Flat
- Initiator: AP
- Approver: AP

Position Data PayPath Actions
- Initiator: AP
- Approver: AP

Pay Rate Change
- Initiator: AP
- Approver: AP

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Writes DIRECTLY to UCPath System

UCSB UCPath

Rev. 7/24/2019
Initiating & Approving PayPath Transactions

Staff, Student, & ASE

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**INITIATOR**
- Job Data Change
- Dept
- Short Work Break
- Dept
- Additional Pay
- Dept
- Position Data
- Dept
- Pay Rate Change
- Dept

**APPROVER**
- Dept
- Dept
- Dept
- Dept
- Dept
- Dept
- Dept

Writes DIRECTLY to UCPath System

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UCPath Workflow Process

Position Control (WFA)

Funding Entry (BFS)

Template Transactions (WFA)

PayPath (WFA)

Additional Pay (BFS)

Budget Distribution (Budget)
Course Agenda

1: PayPath Transaction Overview
2: Position Data Changes
3: Job Data Changes
4: Additional Pay
5: Course Review

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Rev. 7/24/2019
Most position data changes to filled, single headcount positions use **PayPath**.

If you make any **job data** changes via **PayPath** to a multi-headcount position, those changes impact only the incumbent.

* **PayPath Actions** are **NOT** used to **hire**, **terminate**, **transfer** to a new position or place employees on a **leave of absence**.
Template Transactions vs PayPath Actions

**TEMPLATES:**
- Initiated at UCSB
- Fulfilled by UCPath Center

**PAYPATH:**
- Initiated at UCSB
- Approved at UCSB

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**OVERVIEW**

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Examples of changes requested through PayPath Actions:

- Employee Reduction In Time (ERIT)
- FLSA Changes
- FTE Changes
- Probationary Status Changes
- Recurring Additional Pay Payments
- Comp Rate Changes
- Short Work Break / Return from Short Work Break
PayPath Actions are comprised of three tabs: Position Data, Job Data and Additional Pay Data. Navigate to the appropriate tab to enter the related update.
Think about **Effective Dates**

- There is only one effective date for each PayPath transaction.

- A transaction can include updates to fields on multiple tabs (position data, job data).
  - After you enter the **Effective Date** on one of the tabs, that field becomes view-only on the other tabs and for new rows.

1. **Position Data Tab**: It is possible to make more than one change per effective date so long as it is in the same transaction. **Once you use an effective date, that date cannot be used again unless you formally request the UCPC to make a correction.**

2. **Job Data Tab**: Allows **multiple transactions** per effective date

3. **Addl Pay Tab**: Multiple effective dates per transaction

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Rev.7/24/2019
Action Reason Codes

- **Action** and **Action Reason** codes further define the purpose of position data changes and job data changes.

- You must specify the appropriate **Action** and **Action Reason** codes when a PayPath transaction is initiated.

![Image of PayPath transaction with highlighted Action and Action Reason fields]
PayPath **Important Notes**

- After a PayPath transaction is submitted for approval, you cannot enter another PayPath transaction for that employee record until the first transaction has been approved by all Approvers.

- The system does not allow a change to position data if the same effective date was already used for an existing *position change*.

- PayPath allows current or future updates for **Position Data** and **Job Data**.

- If an employee has more than one job, each job record is updated separately.

- **Additional Pay** transactions may use multiple effective dates in the same PayPath Action.
Position Data Changes

Module 2
Position Data and Effective Dates in PayPath

First, Think About …

Effective Dates!

POSITION It is possible to make more than one change per effective date so long as it is in the same transaction. Once you use an effective date, that date cannot be used again unless you formally request the UCPC to make a correction.
Use the **Position Data** tab to enter changes to position data.

The **Position Data** tab provides two areas: **Existing Values** and **New Values to update**.

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

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

**POSITION DATA** updates in PayPath are **only** initiated for **filled** positions with a **single** incumbent.

- Position Data changes allow for **only one transaction per effective date**.
- When a position data change is entered, PayPath automatically updates the **Job Data** tab displaying the updated position information.

**FYI**

The PayPath Actions search option does not allow access to vacant positions. The system displays an error message: “No matching values. You have entered a position number that is vacant.”
Enter search criteria to locate the employee.

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

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

If multiple employees match the search criteria entered, those employees display in the **Search Results**.
For position data changes, the **Action** always defaults to **POS**. You only need to select the appropriate **Position Change Reason** code.
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Position Data Tab

Use the Position Data tab to enter changes to position data. You must enter the Effective Date and the Position Change Reason fields before entering the update.

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

Position information updated on this tab also updates the Job Data tab.

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

Enter the Effective Date for the position update.

Enter the Position Change Reason for the position update.

Use this tab to:
- Enter the Effective Date for the position update.
- Enter the Position Change Reason for the position update.

Click the Position Data link to access the position information component to view details for the position. For example, you can see the position Effective Dates and also if the position has multiple incumbents.
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https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
My student assistant is going to report to a different faculty member within our department. I need to update their record to reflect this change.

1. Can I do this in PayPath?

   **Single headcount = YES**
   **Multi-headcount = NO – Use ServiceNow (staff)/ UCPC (AP)**

2. What reason code is best?

   **RTC**
Job Data Changes

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JOB DATA and Effective Dates in PayPath

First, Think About …

Effective Dates!

JOB Data Changes allow multiple transactions per effective date (sequencing)
Job Data Changes Overview

Use the **Job Data** tab for job-related updates.

- Job Data updates are initiated for employees in either **single** or **multi-headcount** positions.
- **Remember in multi-headcount positions, a change to the job data impacts only the incumbent.**
- If an employee has more than one job, each job must be updated individually.

**NOTE:**
- Some of the **Job Data** fields and values display **differently** for academic employees than they do for staff employees.
- Reason codes dictate which fields are either display-only or open for editing.
Job Data Update Key System Steps

PayPath Initiator

Navigate to PayPath Actions

PayPath Initiator

Review employee information

PayPath Initiator

Update job data

PayPath Initiator

Save and Submit

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Use the **Job Data** tab for various job data changes.

The fields and values available on the **Job Data** tab change depending on whether the employee selected from the search is an academic or staff employee.
The staff and academic versions are very similar; however, each version includes some fields and data that is **SPECIFIC** to either academic or staff employees.

**FOR EXAMPLE, FOR STAFF:**

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

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

- Non-Academic employees - students [5] and limited [4] appointments - are automatically terminated in UCPath on this date.

Locations monitor expected job/appointment end dates and, if needed, update/extend the **Appointment End Date** to ensure the termination does not occur.
FOR ACADEMICS:
• The data values available in the Action and Action Reason fields are specific to academics.
• The Employee Class defaults and cannot be edited.
• The functionality of Pay Components and Earnings Distribution supports academic pay calculations.
• The fields in the UC Job Data section are specific to academics.

For Academic employees, the End Job Automatically check box also appears. This check box must be selected to automatically terminate the academic employee on the Expected Job End Date.
Non-Student Academics
Job Data Changes for Non-Student Academics?

STOP
(Departments) Can’t Touch This!

These are processed in AP
Email: AP-Path@UCSB.edu
Sequencing Multiple Job Data Changes

Effective date sequence is important.

- Enter job changes in the order they occur in a single PayPath Job Data update.
- Sequence number populates automatically.

<table>
<thead>
<tr>
<th>Effective Seq.</th>
<th>Notes</th>
<th>Action</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>* Defaults to 0</td>
<td>Position Promotion</td>
<td>3/1/2019</td>
</tr>
<tr>
<td>1</td>
<td>* Added by user</td>
<td>Pay Rate Change Promotion</td>
<td>3/1/2019</td>
</tr>
<tr>
<td>2</td>
<td>* Added by user</td>
<td>Pay Rate Change Equity</td>
<td>3/1/2019</td>
</tr>
</tbody>
</table>
Job Data Change **Action Reason Codes**

- The **Action** and the **Action Reason** fields are required.
- The **Action** and **Action Reason** codes further define the purpose of job data change transactions.

![Job Data Change Screen](image)

**Job Data**

- **Effective Date**: 02/19/2019
- **Effective Sequence**: 0

**Action** and **Action Reason** fields are required.
The values available in the **Action Reason** field are dependent on the selection made in the **Action** field.

The **Action Reason Description** includes the following options:

- **CAR**: Limited to Career
- **COR**: Correction - Non Pay Related
- **CPR**: Correction-Pay Rate
- **CPT**: Change in Percent Time (FTE)
- **ERI**: Update ERIT End Date
- **EXP**: Extend Expected Return Date
- **EXT**: Add/Extend Appointment
- **LUE**: Update Location Use End Date
- **PHR**: Update Phased Retirement End Date
- **PRB**: Update Probation Code/End Date
- **TMF**: Update Auto Termination Flag
- **TRL**: Update Trial Employment Date

**Action Reason** includes:

- **DTA**: Data Change
- **JED**: Earnings Distribution Change
- **PAY**: Pay Rate Change
- **POS**: Position Change
- **RES**: Reserve/Faculty Abeyance
- **RFR**: Return from Reserve/Abeyance
- **RWB**: Return from Work Break
- **SWB**: Short Work Break

**Look Up Action Reason**

Set up the search criteria and click **Look Up** to view the action reasons.
Use the Job Data tab to enter updates to job-related data such as pay, earnings distribution and short work break. You must enter the Effective Date and the Action and Action Reason fields before entering an update.

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

To review all job data rows for the employee (single employee assignment), click the Workforce Job Summary link. To review all current assignments (multiple employee assignments), click the Person Org Summary link.

Use the PayPath Job Data Comments to record details about the position and/or job changes. This note is stored directly in the notes feature of the Job Data component for the employee.
There are several types of Job Data changes, most of which fall into the first three categories.
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COMMON REASON CODES
PAY RATE UPDATES

REMEMBER:
- Step lives on the job and is entered at hire
- Pay components (comp rate, pay frequency...) auto-populate based on the salary step.
- Salary plan and grade live on the position.
Examples of PayPath Job Earnings Distribution (JED) Updates

The Job Earnings Distribution (JED) is primarily used to distribute earnings by earn codes either by percentage or by amount.

- JED is commonly used when an employee is on ERIT (Employee Voluntary Reduction in Time).
- Summer Salary? See AP Toolkit https://ap.ucsb.edu/resources.for.department.analysts/summer.research.additional.compensation.toolkit/

Non-Exempt employees’ pay is generated based on their hours submitted to Kronos.
Short Work Break Overview

- **SWB stops pay** for an employee for a **temporary** period of time.
- This process applies to certain **staff** and **academic employees**.
- Max length of SWB is **four months**.
- Employee’s on SWB are monitored by the department on a regular basis.
- Departments are responsible for returning employees from SWB.

**NOTE:** Short Work Break is NOT a Leave of Absence.
## Short Work Break Academic Examples

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Students</strong></td>
<td>Used to put academic students off pay status over the summer or in between quarters.</td>
</tr>
<tr>
<td><strong>Variable Appointment</strong></td>
<td>Used to put an exempt academic employee with a highly variable schedule off pay status in between periods of active employment.</td>
</tr>
<tr>
<td><strong>Research Funding Bridge</strong></td>
<td>Used to place an employee that is awaiting research funding on SWB.</td>
</tr>
</tbody>
</table>

*Short Work Break (SWB)*
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### Short Work Break Staff Examples

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<th>Description</th>
</tr>
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<tbody>
<tr>
<td><strong>Partial-Year Career</strong></td>
<td>Used to place a partial-year career employee on furlough. <strong>Action Reason</strong> selection is based on the number of working months the partial-year career employee is scheduled to work: 9, 10 or 11 months. (<em>mostly in STHL</em>)</td>
</tr>
<tr>
<td><strong>Furlough</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Undergraduate Students</strong></td>
<td>Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters.</td>
</tr>
</tbody>
</table>

Be sure to extend the appointment date through and beyond the return from SWB if needed.
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https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
Job Data Change

PayPath Scenario

When I hired the student assistant in our department, they were going to leave their job at the end of Fall Quarter so I entered an expected Job End Date of 12/31/2019.

Things have changed.

The student assistant will now return to this job in the Spring after a SWB in Winter Quarter. I don’t want their job to be wrongly terminated!

What should I do??

Go to the Job Aid
Extend the Job End Date on the Job Data tab in PayPath
Additional Pay

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Additional Pay and Effective Dates in PayPath

First, Think About …

Effective Dates!

Additional Pay allows multiple effective dates per transaction
Additional Pay for staff is any compensation above a University employee’s regular, base compensation.

- There are two types of additional pay transactions:
  - One-time – applies to a single pay cycle or non-consecutive pay cycles.
  - Recurring – payments are paid over multiple, consecutive pay periods in the same amount.

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

- Additional pay is entered as a flat per pay period amount.
  - All prorated payments should be calculated prior to entering the flat amount.

- An employee is not available in PayPath until the Hire Template is approved on campus and fulfilled by UCPC WFA Production.
  - An employee’s additional pay data cannot be updated until the Payroll nightly process assigns the employee’s pay group.
Additional Pay Key System Steps

1. PayPath Initiator: Navigate to PayPath Actions
2. PayPath Initiator: Review employee information
3. PayPath Initiator: Enter Additional Pay data
4. PayPath Initiator: Save and Submit

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Rev. 7/24/2019
Use the top portion of the **Additional Pay Data** tab to enter new additional pay information for an employee. If the employee has current additional pay information, it appears on the right side of the tab.

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

Use the bottom portion of this tab to:
- Upload or view supporting documents.
- Enter comments to the Approver.
- View the **Transaction ID**, **Workflow Status** and **Request Status**.

The buttons allow you to save the transaction for later processing, submit the transaction for approval or cancel the transaction.
Use the PayPath Actions Additional Pay Data tab to enter specific information about the payment.

Add to Employees Current Job Summary of the employee's current job data.

Existing additional pay set up displays in the Current Pay section. If the employee has existing additional pay, it displays in the Current Pay section.

If the employee has no existing additional pay, it will not display.

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

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

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

Enter the earnings code, effective date and pay period amount. You can also enter a goal amount or end date.

Amount or end date also after a goal period. You can enter the earnings code.

Review of this request. Opposers to see during the review of this request.
Example Current Additional Pay

This employee has existing additional pay, which displays in the Current Additional Pay section.
Additional Pay Updates

Updates are made to existing recurring additional pay transactions.

The update must be for the same Earnings Code.

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

After you enter the Earnings Code and the new Effective Date, the current recurring information populates and the Override Data button appears. Click the Override Data button to open the recurring information fields for edit.
The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the **Effective Date**.

In the **Effective Date** field, enter the previous pay period date that the additional pay should have started.
Points to Remember ...

- All **Job Data** fields controlled by **Position Data** appear as display-only for Multi-Headcount positions.

- You cannot process a second PayPath transaction until any pending transaction is approved.

- When a **position data change** is entered, PayPath automatically inserts a new row with the same effective date into the **Job Data tab** and displays the updated position information.

  - **Position Data** and **Job Data** changes can be entered in a single PayPath transaction; however, they must have the same **Effective Date**.
  
  - For **Additional Pay** you can make multiple entries with different **Effective Dates** in a single PayPath transaction.
Best Practices to Remember

☑ When selecting your Position Effective Date…
  • Verify the date is available for use and has not already been used.

☑ Be mindful of where any PayPath effective date falls on the Payroll Processing calendar

REVIEW…REVIEW…REVIEW…

☑ … Workforce Job Summary or Job Data component to review your employee’s record before initiating a PayPath Action and after the PayPath Action is approved.

☑ … data on every tab in a PayPath Action to ensure accurate and current information throughout the employee’s record.

☑ … the employee’s first paycheck with the Additional Pay to verify correct processing.
PayPath Scenarios

NOW what?

1. My employee was granted an equity increase effective 5/1/2019. Where do I make updates?

   Go to the Job Aid
   Position Tab: Change to Exempt
   Job Data: Submit Job Data Update Form to UCPC to change Pay Group to 8MH
   see handout

2. My Staff Student assistant was just hired into a concurrent exempt Academic job. What do I need to do?

   Position Tab: Change to Exempt
   Job Data: Submit Job Data Update Form to UCPC to change Pay Group to 8MH
   see handout
As the Location WFA Initiator, you initiate position data changes, job data changes and additional pay transactions, which move through AWE to Location PayPath Approver(s) for approval.

**PayPath Actions** allows historic, current or future updates in Position Data and Job Data. Retro corrections may require UC Path Center assistance.

Open a case with UCPC when a position transaction is needed but the effective date is not available.

Job Data changes can be made independent of a position data change. However, if a position data change is made, PayPath automatically updates the Job Data tab to display the new position information.

Refer to the PayPath Transactions – Action Codes, Reason Codes and Descriptions job aid for a description of all Action and Action Reason code combinations.
Functional User Help Site

https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources
Where to Get Help

1. **Ask UCPath:**
   Dashboard Menu > Help/FAQ > Ask UCPath

2. **UPK – User Productivity Kit:**
   Dashboard Menu > Help/FAQ > Self Service or Location Users

3. **Functional User Resources:**
   [https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources](https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources)

4. **ACADEMIC PERSONNEL:** Send an email: AP-Path@ucsb.edu

5. **STAFF:** UCSB HR Website / UCPath Tab:
   [https://www.hr.ucsb.edu/ucpath](https://www.hr.ucsb.edu/ucpath)

6. **STAFF:** Submit a ticket to HR Service Now:
   (Position Management/WFA)
   [https://ucsb.service-now.com/global](https://ucsb.service-now.com/global)
Academic Personnel:
AP-Path@ucsb.edu
- Tamara Berton
- Danica Acosta
- Monique Chaidez

Staff:
www.hrhelp.ucsb.edu
- Amy Arnold
- Sarah Soto

PayPath Training
https://www.ucpath.ucsb.edu/functional-user-support/functional-user-resources