Today's Topics

- Review Key Terms & Concepts

- Pre-Process & Special Considerations

- Combination Updates

- Best Practices and Q&A

Key Terms

Term	Definition
Merit	For series in which there is a rank and step system, a merit advancement is a step increase in salary within the same rank. For series in which there is a salary range, a merit advancement is an increase in salary rate without a change in rank or title.
Reappointment	A reappointment is an extension in appointment following academic review. It is normally accompanied by a merit.
Promotion	A promotion is an advancement from one rank to a higher rank within the same academic title series (e.g. Assistant to Associate Professor).
Above Scale	An academic appointee who advances beyond the highest step on the salary scale in a series is considered above scale. For example, in the Professor (ladder-rank) series, the highest step on the salary scale is Step IX, so the next advancement would be to Professor, Above Scale. Not all academic series are eligible for above scale status. Academics may receive further above scale merits after advancing to above scale.
Off Scale	The salary for an appointee at a certain rank and step is designated as off-scale if the salary is higher than the published salary at the designated rank and step for the relevant title series. Off-scale salaries are used to address market conditions (market off-scale) or to award achievements (bonus off-scale) during a review period when a full increase in step is not justified.

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Key Terms

Term	Definition
Series Change	A permanent change from one academic title series to another academic title series without a break in service. A change of series may occur because an individual's duties have changed. Example: Postdoc to Project Scientist.
Salary Scale	University of California system-wide pay scales are established by the Office of the President for most academic titles. The UC academic salary scales may be found at: Current Academic Salary Scales	UCOP
Negotiated Salary	Eligible Senate faculty who participate in the Health Sciences Compensation Plan (HSCP) or the General Campus Compensation Plan (GCCP) will have an annually negotiated salary component that is separate from the scale rate and any off-scale or above scale rate.

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Merits, Reappointment, Off-Scale Changes (Job Data Update Only)

Merit increases involve a change in step (for step-based titles) or a change in the annual rate (for above scale and range-based titles)

Note: If your transaction involves multiple changes (e.g., merit *and* off-scale change, negotiated component change, etc.), you will need to add more than one row of data with the same effective date. To add a row, click on the Add New Row (+) button. The rows should be entered in the order in which they should occur. Updates with different Effective Dates must be entered as separate transactions.

Merits, Reappointments, and Off-Scale Changes

Type	Action
Merit (including Merit/Reappointment) for Step-Based Salary Scales	Action/Action Reason Code: PAY/AMR Update Step; the UCANNL Comp Rate will update automatically If the action includes a reappointment, update the Expected Job End Date field, as appropriate
Merit (including Merit/Reappointment) for Open Range (no steps) Scales	Action/Action Reason Code: PAY/AMR Change the annual rate on the UCANNL Comp Rate If the action includes a reappointment, update the Expected Job End Date field, as appropriate
Advancement to Above Scale	Action/Action Reason Code: PAY/AAS Remove the Step. Delete the UCANNL compensation row using the Delete Row (–) button. Add a compensation row using UCABVE Comp Rate Code and new annual Comp Rate
Further Above Scale Merit	Action/Action Reason Code: PAY/AAS Change the annual Comp Rate on the UCANNL row

Job Aid: How to Process Academic Merits and Promotions

Merits, Reappointments, and Off-Scale Changes

Type	Action
Add New Off-Scale	Action/Action Reason Code: PAY/OFF Add a compensation row using appropriate Comp Rate Code and new annual Comp Rate
Increase Off-Scale	Action/Action Reason Code: PAY/OFF Change the annual Comp Rate on the off-scale row
Decrease Off-Scale	Action/Action Reason Code: PAY/OSD Change the annual Comp Rate on the off-scale row
Remove Off-Scale	Action/Action Reason Code: PAY/OSD Delete the off-scale compensation row using the Delete Row (–) button
Equity Increase (Use only for official salary equity program increases)	Action/Action Reason Code: PAY/EQU •Create new market off-scale if the individual does not already have one (see Add New Off-Scale above) •Change market off-scale amount if the individual has an existing one (see Increase Off-Scale above)
Unit 18 Salary Increase	Action/Action Reason Code: PAY/U18 Change the annual Comp Rate on the UCANNL row

Job Aid: How to Process Academic Merits and Promotions

Promotion (Position and Job Data Update)

A promotion involves a position and job change. Use the Position Change Reason Code: **PRO** and update the necessary fields on Position and Job Data Tabs related to the promotion.

Note: If the promotion includes changes to other Job Data components (e.g., off-scale or negotiated component) with the **same effective date**, you will need to add more than one row of data on Job. To add a row, click on the Add New Row (+) button.
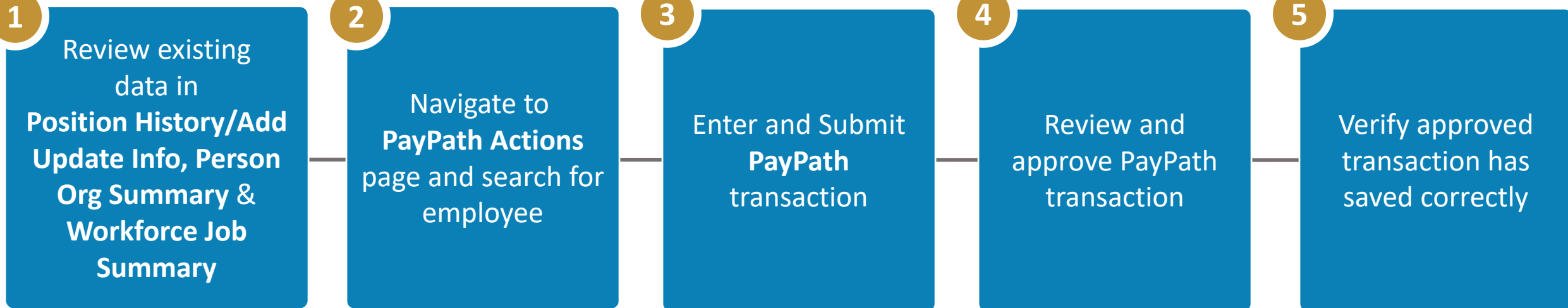
Before starting your transaction…

❑ Review existing data in **Job Data**, **Person Org Summary** or **Workforce Job Summary** as needed to understand changes to-date.

❑ Extend the **Expected Job End Date** if the academic review is not going to be completed by then. Ladder rank faculty titles can be extended through 10/31. For other titles, verify the extension date with your Dean's office. The **Effective Date** on the extension transaction should be 6/29 or earlier and the job should be extended prior to the June **Employee Data Change Deadline**. Consider any and all changes that may be effective on 7/1 and that are impacted by a change in salary. Enter them all in one transaction, if possible, by using effective sequencing (adding rows).

❑ Adhere to special handling deadlines and instructions that Academic Personnel issues, especially if there is a 7/1 range adjustment

❑ Review the *Payroll Processing Calendar* to ensure you submit your transaction in time for approval before the **Employee Data Change Deadline**
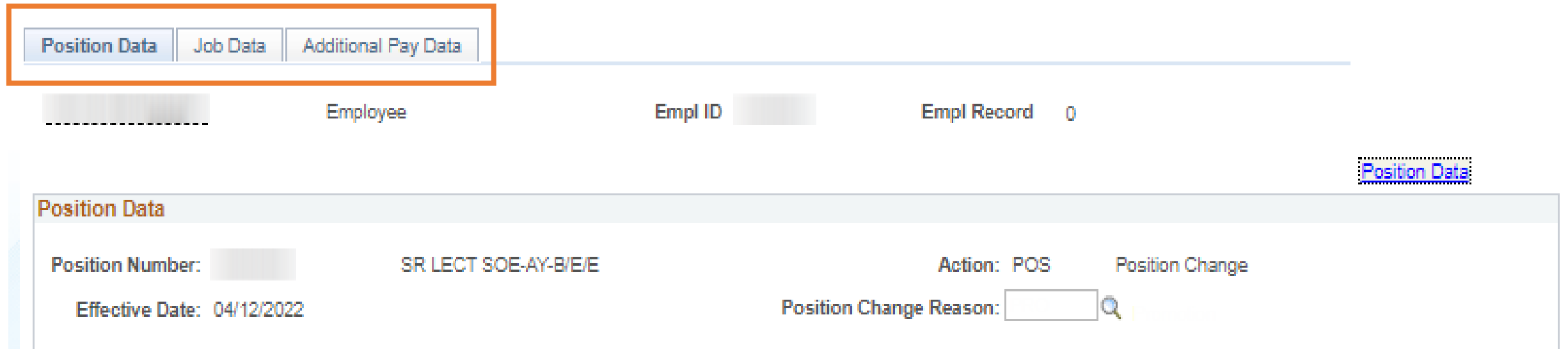
Special Considerations

- **Series Changes (Academic title → Academic title)** should follow the Inter location Transfer Process. Concurrent Hire/Voluntary Term templates with Action Reason TIL.

- **Transfers between Academic title ←→ Staff title** must follow the Inter location Transfer Process. Concurrent Hire/Voluntary Term templates with Action Reason TIL.

- Retroactive rate changes (e.g. merit/promotion) will be paid on the appointee's next normal paycheck following entry in PayPath (provided they were entered/approved before the Employee Data Change deadline); retroactive rate changes are not eligible for off-cycle pay.

- Summer Salary (excluding Summer Session teaching) is based on the 7/1 salary rate. Be sure the step and salary components are correct. Summer Session teaching is based on the 6/30 pay rate.

- GCCP negotiated components change on 7/1; you may have to add, change, or remove the negotiated component. Job Earnings Distribution (JED) is a manual process for GCCP. Please follow the GCCP Quick Reference.

- HSCP has exclusive Comp Rate Codes for the scale rates, off-scale, above scale, and negotiated components of pay. HSCP negotiated components change on 7/1. Job Earnings Distribution (JED) is automatic for HSCP.

- A funding reallocation program runs in UCPath nightly for positions that utilize the Salary Cap/MCOP Funding Worksheet. Changes to FTE, salary components, or JED earn code distribution are picked up by that program and existing funding in the Salary Cap/MCOP Worksheet is reallocated automatically.

PayPath | Key System Steps

1 Review existing data in **Position History/Add Update Info, Person Org Summary** & **Workforce Job Summary**

2 Navigate to **PayPath Actions** page and search for employee

3 Enter and Submit **PayPath** transaction

4 Review and approve PayPath transaction

5 Verify approved transaction has saved correctly

NOTES:

- For Step #4 it is vital that local Approvers understand all concepts as well as the transactions; the review and approve process is not a rubber stamp, but a critical step with expectations of full accountability

- There is no UCPC processing on PayPath Transactions

PayPath | Tabs

- **PayPath** has three tabs: **Position Data**, **Job Data** and **Additional Pay Data**
- **PayPath** opens up on the **Position Data Tab**, the **Action Code** defaults to **POS** as it is the only possibility; if making a Position change you will need to specify the correct **Position Change Reason Code**
- To update **Job Data only**, do not enter anything on the **Positon Tab** and skip to the **Job Data Tab** to enter the changes
- Select the desired tab - It is **not necessary to complete all tabs** for every transaction, e.g., to extend an employee's Appointment End Date, you only need to use the Job Data tab

| Position Data | Job Data | Additional Pay Data |

_____ Employee   Empl ID   Empl Record   0

Position Data

Position Data

Position Number: SR LECT SOE-AY-B/E/E   Action: POS   Position Change

Effective Date: 04/12/2022   Position Change Reason: [   ] 🔍

PayPath | Position and Job Data Updates

- Both **Position Data and Job Data** changes can be entered in single transaction, but must have the **same Effective Date**

- When you initiate a Position Data change, the **Position Data cascades** onto Job Data and **Job Data fields (e.g., step, etc.) become editable**

PayPath | Multi Row Job Data Updates

Click + to add multiple job data changes in the same transaction. Multiple changes can be entered for the same Effective Date. **Must be manually entered in the order you want the updates to occur.**

Transactions with different Effective Dates must be entered as separate transactions

PayPath | AWE

All PayPath transactions are routed for **approval** using the Approval Workflow Engine (AWE)

UC San Diego will require **one approver** for PayPath transactions

Once the transaction is approved locally, it is **committed directly to UCPath**. No UCPC approval/processing is required.

REMEMBER:

- A **pending** PayPath transaction on an employee record **must be approved/denied** before another effective-dated transaction can be entered on that record.

- The **review and approve** process is not a rubber stamp, but a critical step with expectations of full accountability.

Payroll Processing Calendar | Impact for PayPath Transactions

For PayPath transactions to impact payroll they must be approved by the **Employee Data Change Deadline**

Pay Cycle	Check Date	Pay Period Dates		Run ID Schedule	• Employee Data Change *** (3:00 PM) After 3:00 PM changes will not be processed for current pay cycle	Location						UCPath Center						
						Stop Processing PayPath & Position Mngt (5:00 PM)	Resume Processing (6:00 AM)	Campus				Med Center Only		Pay Confirm	DDODS Burst (4:30 AM)	Accrual Post Confirm	GL Post Confirm (Complete Summary Level Data)	GL Post Confirm (Complete Detail Labor Ledger Data)	Pay Statements on UCPath (8:00 AM)	Leave Accrual Available on UCPath (After 5:00 PM)
		Begin	End					• Inbound Files Due **** (2:30 PM) • Msg Error Log Distribution (11:00 PM)	• Location Corrections To Msg Error Log (2:00 PM) • E-703 Funding Upload	• Inbound Files Due **** (5:00 PM) • Msg Error Log Distribution (11:00 PM)	• Location Corrections To Msg Error Log (2:00 PM)								

PayPath and Position Management transactions submitted after the deadline **will not be included in the current pay cycle**.

It is imperative that all locations pay attention to the Stop Processing deadline for both PayPath and Position Management.

Check out the [Review the Payroll Processing Schedule Job Aid](#) to learn more

Resources

Job Aids Page:

How to Process Academic Merits and Promotions

Using Effective Dates in UCPath

UCPath Transactor Help Site:

PayPath Action and Reason Codes (Academic)

PayPath Action and Reason Codes (Staff)

UPK: Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)

BEST PRACTICES

Review existing data in Add Update Position Info, Person Org Summary & Workforce Job Summary

- Ensure you have a complete understanding of the employee's data

- Understand the downstream impacts of your update

Position Data and Job Data changes can be entered in single transaction but must have the same Effective Date

- Updates with different Effective Dates must be entered as separate transactions

- New PayPath transactions cannot be entered until the pending transaction has been approved

Do not let employees auto-terminate in error

- Monitor the **Jobs With Approaching End Dates**

- To extend an appointment, the update must be approved **one day before** Appointment End Date or termination will occur

BEST PRACTICES

Pay Attention to Effective Dates

- The Effective Date of your Position Data change cannot be equal to an existing effective-dated row for the employee's Position Data

- You will get an error message in PayPath and need to submit a Position Update form.

Approve PayPath Transactions by the Employee Data Change Deadline to affect the current pay cycle

- PayPath transactions approved after the deadline will not be included in the current pay cycle

- Once a transaction has been approved locally, it is committed directly to UCPath

Review key resources as often as you need to

- Payroll Processing Calendar

- PayPath – Action and Action Reason Codes and Descriptions Job Aid

- Job Aid: How to Process Academic Merits and Promotions

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Notes

- HI Kelly, can we enter our approved merits and promotions now for effective 7/1/22? **KM: Yes you may.**

- Should we wait to enter GCCP with merits/promos until GCCP is approved? **GCCP may take until June/July to get approved. Use good judgement on timing of entry.**

- so we don't have to worry about that funding issue previously? **More info to come on the FYE funding roll over process.**

- I have a couple of Assistant Professors that deferred review, so they need to be extended for a year. Can I do those now? **KM: Yes you can do those now**

- we can enter promotions now is ok? **KM: Yes.**

- **Cognos Reports for academic reports:**

- **Job End Dates Monitoring Report**

- **Employee Compensation report lists all components of pay for a group. Union Group A6 (academic senate group)**

- **Extend leave monitoring report**

- **Contract pay employees need to be returned to reg status 7/1**

- **Unit 18 specifics coming soon**

- **Poll: Would you like Cognos training for Academic reports? Yes. Send updates separate from the AP Newsletter? Yes.**