Today's Topics

Retro Additional Pay Overview

Scenarios & System Steps

Best Practices & Key Takeaways

Q&A

Overview of Retro Additional Pay

Retro Pay

- Retro Additional Pay increase to Additional Pay previously paid to employee*

Missed Pay

- Retro Additional Pay that has never been paid to the employee

*Entering retro pay for an Additional Pay with an End Date that has already passed will not generate retro pay.

Retro Pay Triggers

A change in an existing Additional Pay Data field will trigger retro pay.

ADDITIONAL PAY DATA TRIGGERS

- Additional Pay Shift
- Earnings End Date
- Goal Amount
- Current Goal Balance
- Hourly Rate

- Other Hours
- Other Pay
- First Pay Period
- Second Pay Period
- Third Pay Period

Understanding the Deadline

- Retro Additional Pay must be entered and approved **by the day before** the **Employee Data Change deadline** for it to be included on the upcoming on-cycle paycheck.

- One-Time Pay requests must be entered and approved by the **Employee Data Change deadline**.

- One-Time Pay **transactions submitted during the non-transaction days will not get submitted on the next on-cycle check**. You will need to enter it again for the next pay cycle.

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	Stop Processing PayPath & Position Mngt (5:00 PM)	Resume Processing (6:00 AM)
		Begin	End				
MO	Mon 01-04-21	12-01-20	12-31-20	201231M0X	Mon 12-21-20 *	Tue 12-22-20	Wed 12-30-20
B1	Wed 01-06-21	12-13-20	12-26-20	201226B1X	Tue 12-22-20 *	Fri 12-25-20	Fri 12-31-21
B2	Wed 01-20-21	12-27-20	01-09-21	210109B2X	Thu 01-07-21	Tue 01-12-21	Fri 01-15-21
MO	Mon 02-01-21	01-01-21	01-31-21	210131M0X	Wed 01-20-21	Mon 01-25-21	Thu 01-28-21
B1	Wed 02-03-21	01-10-21	01-23-21	210123B1X	Thu 01-21-21	Tue 01-26-21	Fri 01-29-21
B2	Wed 02-17-21	01-24-21	02-06-21	210206B2X	Thu 02-04-21	Tue 02-09-21	Fri 02-12-21
MO	Mon 03-01-21	02-01-21	02-28-21	210228M0X	Wed 02-17-21	Mon 02-22-21	Thu 02-25-21
B1	Wed 03-03-21	02-07-21	02-20-21	210220B1X	Thu 02-18-21	Tue 02-23-21	Fri 02-26-21
B2	Wed 03-17-21	02-21-21	03-06-21	210306B2X	Thu 03-04-21	Tue 03-09-21	Fri 03-12-21
B3	Wed 03-31-21	03-07-21	03-20-21	210320B3X	Wed 03-17-21	Mon 03-22-21	Thu 03-25-21

Scenarios & System Steps

- Scenarios that require a PayPath update vs a One-Time Pay request

- Initiate Retro Additional Pay via PayPath

- Submit a One-Time Payment request

Retro Additional Pay: PayPath or One -Time Payment?

PayPath Scenarios

- Post-conversion Retro Additional Pay*

- Employee must have received paycheck in UCPath previously, for those effective dates

One-Time Payment Scenarios

- Pre-conversion Retro Additional Pay

- Late entry of post-conversion Additional Pay

- Post-conversion Additional Pay with an End Date that has already passed – will not generate retro pay

Scenario 1 | Post Conversion Retro Additional Pay

A monthly employee should have received a stipend of $100 a month for January 2021 to May 2021.

Pre Steps:

- **Check if the employee received paychecks on 2/1/21 and 3/1/21 for January and February earnings.**

If they had a paycheck on 2/1/21 and 3/1/21, then Enter Retro Addl Pay:

- **Effective Date = 1/1/21**
- **End Date = 5/31/21**
- **Pay Period Amount = $100**

If they did **NOT** have a paycheck on 2/1/21 and 3/1/21:

- **Enter a One-Time Payment for January and February**
- **Enter a new Additional Pay for $100 per pay period effective 3/1/21 with end date of 5/31/21.**

A monthly employee should have received a $100 stipend a month for January 2020 to December 2021.

1. **Enter a One-Time Payment for January 2020 to February 2021.**

2. **And enter a new Additional Pay for the current and future pay periods.**

   - **Effective Date = 3/1/21**

   - **End Date = 12/31/21**

   - **Pay Period Amount = $100**

A monthly employee should have received a stipend of $100 a month for September 2020 to December 2020.

Since the end date has already passed, submit through One-Time Pay.

In order to initiate Retro Additional Pay, navigate to the **PayPath Actions page**.

NAVIGATION

- ➤ PeopleSoft Menu
- ➤ UC Customizations
- ➤ UC Extensions
- ➤ **PayPath Actions**

PayPath Actions

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

Find an Existing Value

▼ Search Criteria

Empl ID	begins with	
Empl Record	begins with	
Name	begins with	
Last Name	begins with	
Business Unit	begins with	
Position Number	begins with	
Department	begins with	
Job Code	begins with	
Employee Classification	begins with	
Employee Status	=	

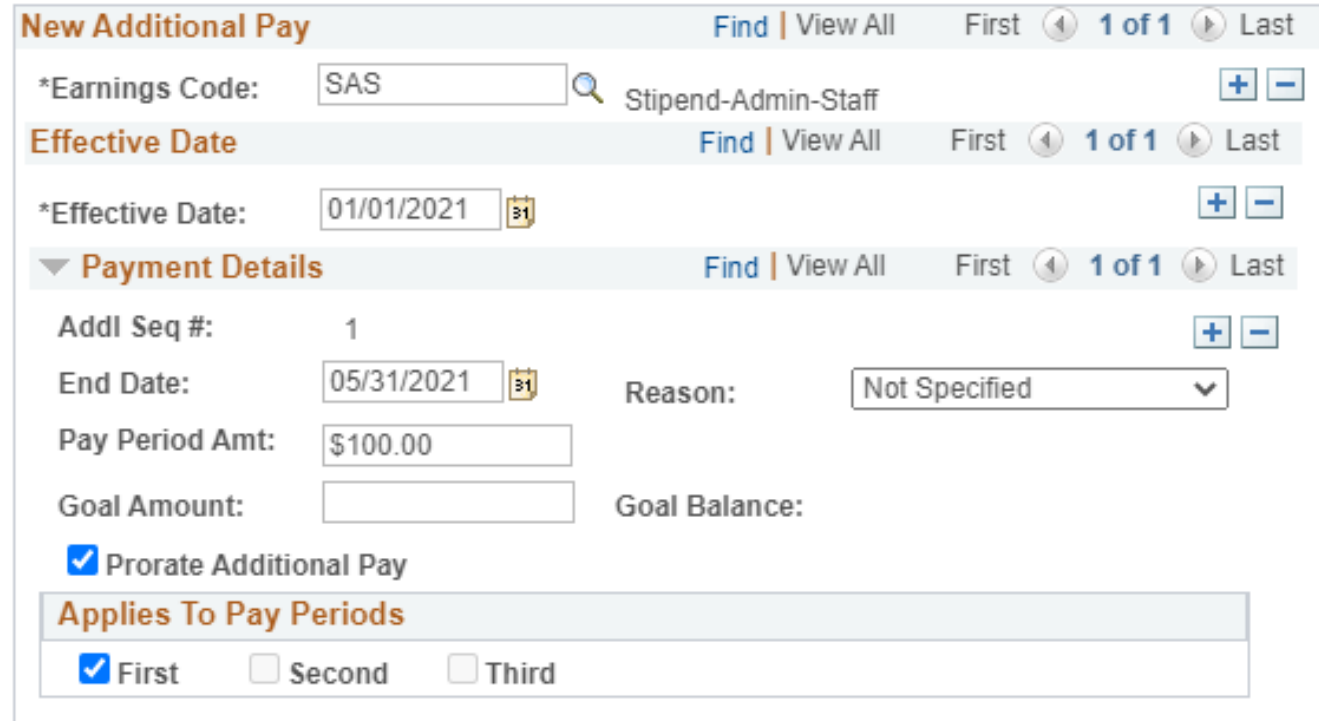☐ Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

System Steps

1. Enter search criteria on the **Find Existing Value** tab

2. Click the **Search** button and select the employee record you want to create additional pay for

3. Click on the **Additional Pay** tab

4. Enter the **Earnings Code**; you can click on the lookup icon next to the field to select from a list of values

5. Enter the Effective Date for the additional pay

   Note: The Effective Date should be the first day of the first pay period in which you'd like the additional pay distributed, or the employee's start date/first day the additional pay should start paying if they begin work mid-pay period.

System Steps

6. Enter the **End Date** and/or **Goal Amount**; these fields indicate when the additional pay will stop
   - **The End Date** should be the <u>last day in last pay period</u> in which the pay will be distributed (Do not enter matching **Effective Date** and **End Dates**)
   - For one-time additional pay, the best practice is to enter <u>both</u> an **End Date** <u>and</u> a **Goal Amount**
   - For recurring additional pay, enter an **End Date**; entering a **Goal Amount** is optional

7. Enter the **Pay Period Amt**; this is the amount that should be distributed each pay period

   Note: Do not enter a prorated amount if the **Prorate Additional Pay** checkbox is checked. UCPath will prorate the Additional Pay based on the employee's start date, termination/leave date, or mid-month Additional Pay. If you enter a prorated amount and the **Prorate Additional Pay** checkbox is checked, it will get prorated twice.

8. Click the **Reason** drop-down menu and select **Retroactive Change**

New Additional Pay	Find | View All	First ◀ 1 of 1 ▶ Last
*Earnings Code: SAS 🔍 Stipend-Admin-Staff		➕ ➖

Effective Date	Find | View All	First ◀ 1 of 1 ▶ Last
*Effective Date: 01/01/2021 📅		➕ ➖

▼ Payment Details   Find | View All   First ◀ 1 of 1 ▶ Last

Addl Seq #: 1		➕ ➖
End Date: 05/31/2021 📅	Reason:	Retroactive Change ▼
Pay Period Amt: $100.00		
Goal Amount:	Goal Balance:	

☑ Prorate Additional Pay

Applies To Pay Periods

☑ First   ☐ Second   ☐ Third

9. We recommend you do not change the **Prorate Additional Pay** checkbox; Additional Pay will prorate based on the employee's start date, termination/leave date, or mid-month Additional Pay.

    Note: You do have the option to uncheck the **Prorate Additional Pay** checkbox, if you want to ensure a certain amount will pay no matter what.

10. Review the **Applies to Pay Periods** checkboxes and update for biweekly employees, if needed
    - The **First** box is checked for monthly employees; the **First** and **Second** boxes are checked for biweekly employees
    - If you want the additional pay to be disbursed on the third pay period of the month, which happens twice a year, select the **Third** checkbox

11. Use the **Add a New Row** (+) button in the **Earnings Code** section to add a new row(s) to enter another additional pay entry, if needed

---

New Additional Pay   Find | View All   First ◄ 1 of 1 ► Last

*Earnings Code: SAS 🔍 Stipend-Admin-Staff   [+] [−]

Effective Date   Find | View All   First ◄ 1 of 1 ► Last

*Effective Date: 01/01/2021 📅   [+] [−]

▼ **Payment Details**   Find | View All   First ◄ 1 of 1 ► Last

Addl Seq #:   1   [+] [−]

End Date: 05/31/2021 📅   Reason: Retroactive Change ▾

Pay Period Amt: $100.00

Goal Amount: _____   Goal Balance:

☑ Prorate Additional Pay

Applies To Pay Periods

☑ First   ☐ Second   ☐ Third

12. Click on the **Job Data** tab; use the **Job Data Comments** field to describe the transaction

13. Click the **Additional Pay** tab; enter **Initiator Comments** for your approver and click the **Save and Submit** button

UC Job Data

ERIT/Phased Retirement End Dt: ☐ 📅

Probation Code: Probation Completed ▼

Location Use End Date: ☐ 📅

Location Use Type: ▼

Trial Employment End Date: ☐ 📅

PY Career Duration: ▼

Probation End Date: 01/29/2016 📅

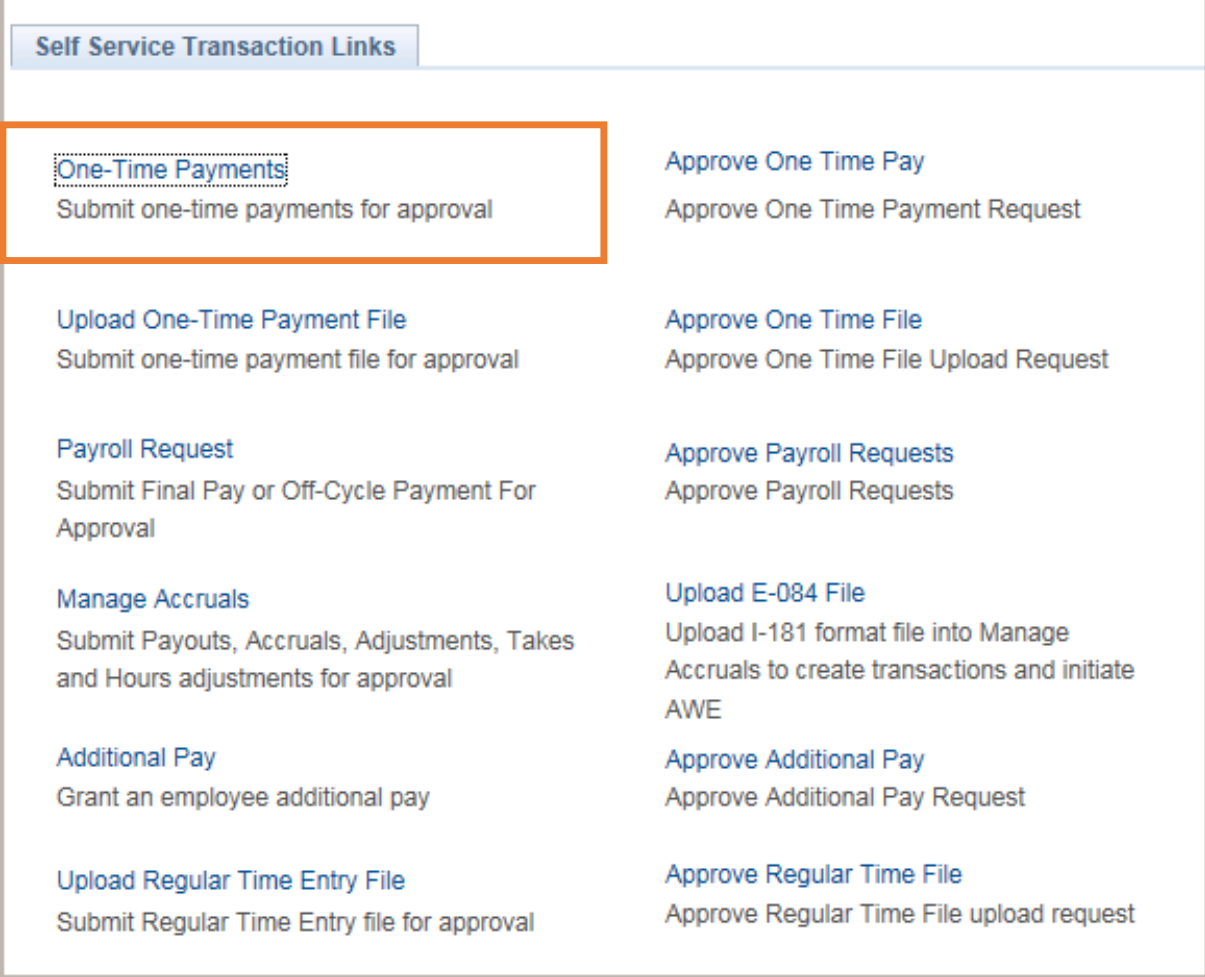Job Data Comments: Entered retroactive staff administrative stipend for $100 per pay period starting 1/1/21 to 5/31/21.

[Save for Later] [Save And Submit] [Cancel]   Upload \ View Supporting Documents

Transaction ID   NEW

Workflow Status   Apprvl Prc

Request Status   In Progress

Initiator's Comments   Entered retroactive staff administrative stipend for $100 per pay period starting 1/1/21 to 5/31/21.

Self Service Transaction Links Page l Navigation

In order to submit a One-Time Payment, navigate to the **Self-Service Transaction Links page** and select the **One-Time Payments link**.

NAVIGATION

- PeopleSoft Menu

- UC Customizations

- UC Extensions

- **Self Service Transaction Links**

Self Service Transaction Links

One-Time Payments
Submit one-time payments for approval

Approve One Time Pay
Approve One Time Payment Request

Upload One-Time Payment File
Submit one-time payment file for approval

Approve One Time File
Approve One Time File Upload Request

Payroll Request
Submit Final Pay or Off-Cycle Payment For Approval

Approve Payroll Requests
Approve Payroll Requests

Manage Accruals
Submit Payouts, Accruals, Adjustments, Takes and Hours adjustments for approval

Upload E-084 File
Upload I-181 format file into Manage Accruals to create transactions and initiate AWE

Additional Pay
Grant an employee additional pay

Approve Additional Pay
Approve Additional Pay Request

Upload Regular Time Entry File
Submit Regular Time Entry file for approval

Approve Regular Time File
Approve Regular Time File upload request

UC San Diego

System Steps

1. Enter search criteria under the **Employee Selection Criteria**

2. Click the **Get Employees** button and select the employee record you want to create additional pay for

3. Enter the **Earnings Code**; you can click on the lookup icon next to the field to select from a list of values

4. Enter the **Earnings Amount** and the Earnings Begin and Earnings End dates.

   Note: Use the + button to add multiple pay periods

5. Enter **Initiator Comment** and Click **Submit**

☐ Do you want to override the ChartField values?

New One Time Payments   Find | View 1   First ◄ 1-2 of 2 ► Last

*Earnings Code: SAS 🔍 Stipend-Admin-Staff   Reason Code [▾] ➕ ➖
☐ Gross-Up

Earnings Amount: 100.00   *Pay End Date: 03/31/2021

*Earnings Begin: 09/01/2020   *Earnings End: 09/30/2020

*Earnings Code: SAS 🔍 Stipend-Admin-Staff   Reason Code [▾] ➕ ➖
☐ Gross-Up

Earnings Amount: 100.00   *Pay End Date: 03/31/2021

*Earnings Begin: 10/01/2020   *Earnings End: 10/31/2020

Initiator Comment: Entered missed stipend for $100 September 2020 and $100 October 2020.

Submit   Return

BEST PRACTICES

Late entry of Additional Pay should be paid through One-Time Payments

- Retro pay cannot be generated if the employee never had paychecks for the effective dates in UCPath

- Can submit Off-Cycle Pay request if it is the employee's only pay or financial hardship

Pay close attention to End Dates

- PayPath will not accept Additional Pay entries with End Dates that have already passed

Retro Additional Pay crossing back to pre-conversion pay periods

- Submit all missing amounts via One-Time Payments

- Enter current and future pay periods via PayPath Additional Pay

UC San Diego

Key Takeaways | Entering Retro Additional Pay

- Retro pay cannot be generated if there was no paycheck issued in the past to compare the Retro Additional Pay entry to.

- Any pre-conversion Retro Additional Pay will need to be submitted as One-Time Payment.

- Post-conversion Retro Additional Pay can be paid through PayPath as long as the End Date of the Additional Pay has not passed. If the End Date of the existing Additional Pay has already passed, you will need to enter the Retro Additional Pay as a One-Time Payment.

- If the missing Additional Pay crosses back into pre-conversion pay periods, you can choose to submit all missing amounts/payments via One-Time Payment, and then enter the Additional Pay for the current and future pay periods via PayPath Additional Pay.

- Follow the instructions in the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* on the Help Site for Transactional Users.

- Follow the instructions in the *Submit One-Time Payment Request* on the Help Site for Transactional Users.

- I may have missed something but are you saying that if we need to pay a stipend for a monthly employee that started the stipend prior to conversion we need to process a one time payment through the most recent month and then start a new additional pay stipend moving forward? **If the missing Additional Pay crosses back into pre-conversion pay periods, you can choose to submit all missing amounts/payments via One-Time Payment, and then enter the Additional Pay for the current and future pay periods via PayPath Additional Pay.**

- I submitted a childcare reimbursement yesterday as additional pay for December 2020 (Fall Quarter) — the grad student is now on a SWB for WI21, will this be paid out no problem? **SWB is not active Payroll Status. For employees on SWB/Leave submit case to UCPC for any missing pay.**

- If I need to pay a monthly stipend for Feb and March 2021, is this considered retro because the Feb stipend time period has passed? **Since today is 3/10/21, you will submit a One Time Payment effective 2/1/21 end date 2/28/21 and then submit a new additional pay effective 3/1/21.**

- If we are doing a retro additional pay for one month that we are past the end date of (ex: January 2021), should we solely submit the one-time payment OR should we add the additional pay in PayPath (for record purposes since it won't pay out if the end date has passed) and then submit the one-time payment? **Submit through One time pay since end date already passed, you enter the effective dates and earn codes in the One-Time Pay so there will be a record of the CCA paid for those effective dates.**

- Do you have any information about funding retro additional pay correctly? **You can use the override ChartField button to enter the funding source you want it to go to. It is working properly for the One-Time Payment module.**

- Follow up to my funding question. Can you also verify that if we do not check the override chart field button, then the retro pay will hit whatever the current position funding is, rather than the funding that was effective during that past "retro" period? **Retro pay should take into consideration the effective dates entered and hit the correct funding for those dates.**

- Could we technically just submit one-time payment for all retro pays, to ensure that it will actually pay out? instead of using PayPath Addt'l Pay? **Best practice provided was any late entry of Addl Pay should be entered through One-Time Payments. Note: One-Time Payments transactions (and Manage Accruals transations) submitted during the blackout period will not get submitted on the next on-cycle pay period. You will need to enter again for the next pay cycle.**

- How do I process a retro summer salary? Concurrent hire was approved but it did not trigger retro pay. It is for the month of July 2020 and the position is now inactive.   Can I process it as a one-additional? **One-Time Payment for this missed pay. If the employee is inactive payroll status, will need to submit a case to UCPC to pay the missed pay.**

UC San Diego

- If UCPath does not pay retro additional pay. Why did UCPC generated a retro module report and process retro payment in addition to my one- time payment transaction? **Retro pay gets generated if there is a paycheck issued in the past to compare it to. So in your situation, it sounds like the employee had already received a regular paycheck for the effective dates of the retro addl pay entries. You should refrain from entering in both PayPath and One-Time Pay as it may cause overpayment.**

- If the "Pro-rate Additional Pay" box is checked and the stipend effective date is mid-month, will it be pro-rated accurately? Previously stipends were only pro-rated based on the employee's hire date or term date. **We have been told this issue has been fixed but submit a SNOW ticket if you see this is not correct.**

UC San Diego

UC San Diego
Health Sciences

Updated as of 3/10/21