Transactor Support: PayPath & Data Forms
Today’s Topics

- Effective Date Rules in PayPath
- Data Forms
- Reviewing Position and Job Data
- Scenarios
- Notes for Initiators & Approvers
- Q&A
Effective Date Rules

- Data Types
- Rules by Data Type
## PayPath: Three Types of Data

<table>
<thead>
<tr>
<th>Position Data</th>
<th>Job Data</th>
<th>Additional Pay Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Step</td>
<td>Earn Code</td>
</tr>
<tr>
<td>Department ID</td>
<td>Employee Class</td>
<td>Payment Details</td>
</tr>
<tr>
<td>Location</td>
<td>Appointment End Date</td>
<td></td>
</tr>
<tr>
<td>Job Code</td>
<td>End Job Automatically Checkbox</td>
<td></td>
</tr>
<tr>
<td>Union Code</td>
<td>Pay Frequency</td>
<td></td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Pay Components (Comp Rate Code, Amount)</td>
<td></td>
</tr>
<tr>
<td>Reports To Position</td>
<td>Job Earnings Distribution (Earn Code, Amount)</td>
<td></td>
</tr>
<tr>
<td>Salary Admin Plan</td>
<td>ERIT/Phased Retirement End Date</td>
<td></td>
</tr>
<tr>
<td>Salary Grade</td>
<td>Probation fields or Post Doc Anniversary Date and Academic Duration of Appointment</td>
<td></td>
</tr>
<tr>
<td>FTE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Pool</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Relations Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
An **Effective Date** is the first day of the new status.

**Example:** An employee needs to be reclassified as of 7/1/2020; enter position data update with **Effective Date** 7/1/2020, appropriate **Action/Reason Code**, and new **Job Code**.
Effective Date Rules for All Data Types in PayPath

**EFFECTIVE DATE**

- Cannot be prior to last **Hire Date**.
- Cannot be prior to system **Conversion Date**. Conversion Date is based on business unit and whether employee is biweekly (5/17) or monthly (5/1).
- Cannot exceed the **Expected Job End Date**.

We have been told that PayPath is allowing 5/1 – 5/16 Effective Dates on Biweekly records. However, this **will not** trigger retro pay.
Effective Date Rules for Position Data

- Only one position data update can be submitted on any single **Effective Date**
- You can use the Hire Date as an **Effective Date** on the Position Data tab (but not on the Job Data tab)

**What Triggers Retro Pay?**
- FTE does not trigger Retro Pay. An FTE change is technically missed pay not retro pay. After updating FTE, submit an off-cycle pay request for the missed pay/
Effective Date Rules for Job Data

- **Effective Date** can be re-used, but transactions with the same **Effective Date** are saved in the order in which they are entered into the system.

- You **cannot** use the Hire Date as an **Effective Date** on the Job Data tab.

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What Triggers Retro Pay?

- Compensation fields on the Job Data tab trigger retro pay* on the next on-cycle pay check.

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*Retro Pay is different than missed pay
Effective Date Rules for Additional Pay Data

- **Effective Date** can be re-used, but transactions with the same **Effective Date** are saved in the order in which they are entered into the system.

**What Triggers Retro Pay?**
- A historical **Effective Date** will trigger retro pay* on the next on-cycle pay check.

*Retro Pay is different than missed pay
Reviewing Position and Job Data

- Workforce Job Summary Page
The Workforce Job Summary page shows all job data updates for a particular employee record. 

REMEMBER: All Position Data is also Job Data, so you’ll see both here.

### Workforce Job Summary

<table>
<thead>
<tr>
<th>Organization Relationship</th>
<th>Emp Record</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Action</th>
<th>Action Reason</th>
<th>Description</th>
<th>Job Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>1</td>
<td>06/17/2020</td>
<td>1</td>
<td>POST Chg</td>
<td>RTC</td>
<td>Reports To Change</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>06/17/2020</td>
<td>0</td>
<td>POST Chg</td>
<td>RTC</td>
<td>Reports To Change</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>06/10/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>EXT</td>
<td>Add/Extend Appointment</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>05/01/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>CNV</td>
<td>CONV: Conversion row</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>04/01/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>DIS</td>
<td>CONV: Distribution Begin Date</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>04/19/2018</td>
<td>1</td>
<td>Transfer</td>
<td>CNV</td>
<td>Used for Conversion</td>
<td>Secondary</td>
</tr>
<tr>
<td>EMP</td>
<td>1</td>
<td>04/19/2018</td>
<td>0</td>
<td>Hire</td>
<td>CNV</td>
<td>Conversion Use Only</td>
<td>Secondary</td>
</tr>
</tbody>
</table>
Data Forms

- When to use data forms
The Position Update Form is required if corrections are needed in Position Data and the effective date for the correction is:

- Equal to the effective date on an existing row (e.g., 5/1/2020)
- Prior to the most current effective-dated row*
- Prior to Conversion or equal to Conversion Date
- When changing an Effective Date

The Position Update Form is accessed through the Forms Library on UCPath Online and submitted via Case to UCPC.

*Other Locations indicate we can use Effective Dates prior to the current row. If you submit these in PayPath, review Workforce Job Summary to ensure the data changes cascade forward.
The Job Data Update Form is required if the update needed in Job Data:

- Has an effective date prior to the most current effective-dated row*
- Effective sequencing can't be used to make the correction on the most current effective-dated row
- Has an effective date equal to the Hire Date
- When changing an Effective Date

**EXAMPLE:** Correcting the effective date of a hire/rehire

- The Job Update Form is accessed through the **Forms Library** on UCPath Online and submitted via Case to UCPC.

*Other Locations indicate we can use **Effective Dates** prior to the current row. If you submit these in PayPath, review **Workforce Job Summary** to ensure the data changes cascades forward.
**Requesting UCPC Correction – For Pay-Impacting Changes Prior to Conversion**

- **The UCRS Job History Update Form** is required if the update needed in Job Data is **prior to Conversion**.

- Only used to correct Job Data in conjunction with missing/retro pay.

- The **UCRS Job History Update Form** is accessed through the **Forms Library** on UCPath Online and submitted via Case to UCPC.
Scenario: Extend and Place on SWB

Scenario: A Student Worker in your department worked through the Spring, will not work in the Summer, and will be back to work in the Fall. The current job has an Appointment End Date of 6/30.

System Steps: Option 1

- Extend the Appointment End Date
  - Effective Date = 6/29 or earlier; new Appointment End Date must be at least through the first day of work in Fall, but may extend through the end of Fall if appropriate

- Put the employee on Short Work Break using Effective Date 7/1

These are two separate PayPath transactions because they have different Effective Dates.

System Steps: Option 2

- Allow the job to auto-terminate
- Rehire the employee using the Effective Date of the first day of the Fall
Scenario: The current FTE is .5 and the current Appointment End Date is 6/30. I want to extend the appointment through the end of the year and update the FTE to .75.

System Steps

- Extend the Appointment End Date using Effective Date 6/29 or earlier
  - New Appointment End Date = 12/31/2020
- Update the FTE using Effective Date 7/1

These are two separate PayPath transactions because they have different Effective Dates.
Scenario: I've updated FTE with an Effective Date of 7/1. However, I now need to update the Reports To with the same Effective Date since that is the first date of Summer Session. The Reports To has to be updated since the employee reports time in Ecotime and the new instructor would be approving their time rather than the current instructor in the Reports To field.

System Steps

- Update the Reports To using Effective Date 7/2; this will not impact the employee’s access to the timesheet, and the Supervisor should have access well before timesheet approval
Scenario: Change of Hire Date

**Scenario:** I processed a hire with **Effective Date 7/1** and it has been approved by UCPC. Now, we’ve learned the employee will start **7/8**.

**System Steps**

- Submit the **Job Data Update Form** via case to UCPC to request a change of the hire date
  - Type of Update = Update Existing Row
  - Action and Reason = Review **Workforce Job Summary** to see the **Action** and **Reason** on the Hire row
  - **Effective Date** = 7/1
  - Fill out the rest of the *required fields*
  - In the **Comments** tell UCPC to change the **Effective Date** on the Hire row to 7/8
**Scenario: Hire with Start Date Retro to Conversion**

**Scenario:** I identified an employee whose job should have started 4/15. They never received pay and no job converted into UCPath.

**System Steps**

- Submit a Hire template transaction with an **Effective Date** of 4/15

- No retro pay will be automatically generated; but the next on-cycle pay check will be correct for the current pay period

- Submit an off-cycle payroll request for all pay missing up through the current pay cycle
  - Pre-conversion earnings may need to be entered in the **Comments**
Scenario: Hourly Compensation Rate increases as of February 1st, 2020.

System Steps
- Submit a UCRS Job History Update Form via case to UCPC to show comp change for the time period prior to conversion
- Submit an Off-cycle payroll request for the pre-conversion retro pay that is owed using the Initiator Comments
- Initiate a PayPath Job Data update effective date of conversion (5/1 or 5/17) to update the Compensation Rate; this will automatically trigger retro pay for post-conversion amounts which will be distributed on the employee’s next on-cycle pay check
Notes for Initiators and Approvers

- Important Things for Initiators to Remember
- Critical Fields for PayPath Approvers
Important Things for Initiators to Remember

• You must update the **Effective Date**; it will default to today’s date

• Data changes should be described by your **Action/Reason Code**

• Describe your update(s) in the **Job Data Comments**; these comments are saved with the transaction

• Use **Initiator Comments** to add additional information for you approver; these comments are not saved with the transaction

• PayPath transactions do not route to UCPC; data changes are saved once locally approved
  • The way to determine if your PayPath transaction has been approved is to check the PayPath screen directly
  • Employee record is “locked” for PayPath transactions until the current transaction is approved or denied

• Review your PayPath changes to be sure they have been committed to the system
  • You can use PayPath or Workforce Job Summary

• The deadline for Additional Pay is the **day before** the Employee Data Change deadline
Critical Fields for PayPath Approvers

- The **Effective Date** defaults to today’s date PayPath; always check the **Effective Date**
- Closely review all compensation-related fields: **FTE, Salary Admin Plan, Grade, Step, Pay Components**, etc.
- **FTE** should not be zero unless the employee will only receive pay via Additional Pay