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>
</tbody>
</table>
What is an Effective Date?

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 the **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.

What Triggers Retro Pay?
- None of the data fields on Position Data trigger 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.
A single **Effective Date** can be used for multiple, separate updates.

Transactions with the same **Effective Date** are saved in the order in which they are entered into the system. These are considered **Effective Sequences**. Effective Sequence defaults based on order of entry.

**What Triggers Retro Pay?**

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

*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.
- Follow the instructions in the *Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)* on the Help Site for Transactional Users to understand how to override to make changes on existing Additional Pays.

**What Triggers Retro Pay?**
- A historical **Effective Date** will trigger retro pay* on the next on-cycle pay check.
- If you are entering retroactive Additional Pay, follow the steps in *the Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* on the UCPATH Help Site for Transactional Users.

*Retro Pay is different than missed pay*
Fields that Trigger Retro Pay

A change with a historical **Effective Date** to an existing Job Data or Additional Pay Data field will trigger retro pay on the employee’s next on-cycle paycheck; this includes updates requested via form.

<table>
<thead>
<tr>
<th>Job Data Triggers</th>
<th>Additional Pay Data Triggers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp Rate</td>
<td>Additional Pay Shift</td>
</tr>
<tr>
<td>Comp Rate Code</td>
<td>Earnings End Date</td>
</tr>
<tr>
<td>Compensation Frequency</td>
<td>Goal Amount</td>
</tr>
<tr>
<td>Payroll Status</td>
<td>Current Goal Balance</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Hourly Rate</td>
</tr>
<tr>
<td>Job Code</td>
<td>Other Hours</td>
</tr>
<tr>
<td>Position Number</td>
<td>Other Pay</td>
</tr>
<tr>
<td>Regular Shift</td>
<td>First Pay Period</td>
</tr>
<tr>
<td>Shift Differential Factor</td>
<td>Second Pay Period</td>
</tr>
<tr>
<td>Standard Hours</td>
<td>Third Pay Period</td>
</tr>
<tr>
<td>Standard Work Period</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE**: A data change that indicates an overpayment does not trigger any system action. The department must submit an Overpayment Payroll Request.
A retroactive change to FTE does not trigger retro pay.
- A retroactive change to FTE is a missed pay scenario
- This is because the employee worked some percent of time for which they did not receive any pay

If you make a retroactive update to FTE, process an Off-Cycle Payroll Request for the percentage of pay the employee missed.

A late hire does not trigger retro pay.
- The Retro Pay Module relies on confirmed pay history
- This means the employee must have processed pay for the hours worked
- A late hire has not had any pay generated, so will not trigger retro pay

If you process a late hire, process an Off-Cycle Payroll Request for the pay the employee missed.
# 2020 PayPath Non-Transaction Days: Biweekly

<table>
<thead>
<tr>
<th>Pay Period Begin Date</th>
<th>Pay Period End Date</th>
<th>Employee Data Change Deadline (3:00 pm)</th>
<th>Pay Confirm Date</th>
<th>No PayPath Entry Starts at 3:01 pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/23</td>
<td>9/5</td>
<td>9/3</td>
<td>9/10</td>
<td>9/3 - 9/10</td>
</tr>
<tr>
<td>9/6</td>
<td>9/19</td>
<td>9/18</td>
<td>9/24</td>
<td>9/18 - 9/24</td>
</tr>
<tr>
<td>9/20</td>
<td>10/3</td>
<td>10/2</td>
<td>10/8</td>
<td>10/2 - 10/8</td>
</tr>
<tr>
<td>10/4</td>
<td>10/17</td>
<td>10/16</td>
<td>10/22</td>
<td>10/16 - 10/22</td>
</tr>
<tr>
<td>10/18</td>
<td>10/31</td>
<td>10/29</td>
<td>11/4</td>
<td>10/29 - 11/4</td>
</tr>
<tr>
<td>11/1</td>
<td>11/14</td>
<td>11/13</td>
<td>11/19</td>
<td>11/13 - 11/19</td>
</tr>
<tr>
<td>11/29</td>
<td>12/12</td>
<td>12/11</td>
<td>12/17</td>
<td>12/11 - 12/17</td>
</tr>
<tr>
<td>12/13</td>
<td>12/26</td>
<td>12/22</td>
<td>12/30</td>
<td>12/22 - 12/30</td>
</tr>
</tbody>
</table>

**Note:** You can submit PayPath transactions with **Effective Dates** that are not being processed in the current payroll. Example: Between 9/3 and 9/10, you should not submit a PayPath transaction with **Effective Date** = 8/25, but you can submit a transaction with **Effective Date** = 9/6 (new pay period).
PayPath Non-Transaction Days: Monthly

<table>
<thead>
<tr>
<th>Pay Period End Date</th>
<th>Employee Data Change Deadline (3:00 pm)</th>
<th>Pay Confirm Date</th>
<th>No PayPath Entry Starts at 3:01 pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>October</td>
<td>10/20</td>
<td>10/26</td>
<td>10/20 - 10/26</td>
</tr>
<tr>
<td>November</td>
<td>11/16</td>
<td>11/25</td>
<td>11/16 - 11/25</td>
</tr>
<tr>
<td>December</td>
<td>12/21</td>
<td>12/29</td>
<td>12/21 - 12/29</td>
</tr>
</tbody>
</table>

**Note:** You can submit PayPath transactions with **Effective Dates** that are not being processed in the current payroll. Example: Between 9/21 and 9/25, you should not submit a PayPath transaction with **Effective Date** = 9/15, but you can submit a transaction with **Effective Date** = 10/1 (new pay period).
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.
When to Review Workforce Job Summary

You should review Workforce Job Summary:

- After your PayPath Transaction is approved
- After your Template Transaction is processed
- After your Leave of Absence action is processed
- When troubleshooting pay or benefit issues
- Before submitting a PayPath Transaction if you are not sure what Effective Dates are available to you
  - You can’t use an Effective Date in Position Data that has already been used for a Position Data update
    - All Position Data updates will have Action = Posn Chg
Things to Look for in Workforce Job Summary

- What is the most current effective-dated row?
- What Effective Dates have been used for Position Data changes?
- What are the Action & Reason Codes?
  - These tell you what data change you should look for
  - This is why you should do one Action/Reason Code (one transaction) per data change, when possible
- Have rows been entered by automatic processes? (e.g., change in benefits eligibility, paygroup, probation status, etc.)
Notice that Position Data changes you make in PayPath create two rows in Workforce Job Summary.

1. This Posn Chg/RTC row was created as part of the Conversion process
2. The two 5/18 Posn Chg/RTC rows were created as the result of a single PayPath update on the Position Data tab
Benefit Eligibility changes are entered by automatic UCPath processes nightly or by UCPC transactors. An employee's benefits eligibility is assessed nightly with a process that evaluates multiple variables (FTE, Expected Job End Date, and more) to see if an employee will keep benefits, lose benefits or gain benefits based on job changes that may have occurred for the employee that day.

In this screenshot, the benefits eligibility change is likely driven by the FTE change associated with the Short Work Break.
You can see a system update created a row for probation completion.

<table>
<thead>
<tr>
<th>Organizational Relationship</th>
<th>Empl Record</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Action</th>
<th>Action Reason</th>
<th>Description</th>
<th>Job Indicator</th>
<th>Job Code</th>
<th>Description</th>
<th>Classified Ind</th>
<th>Empl Status</th>
<th>Full/Part Time</th>
<th>Standard Hours</th>
<th>FTE</th>
<th>FLSA Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>0</td>
<td>07/12/2020</td>
<td>0</td>
<td>Pay Rt Chg</td>
<td>ATB</td>
<td>Across-The-Board</td>
<td>Primary</td>
<td>007879</td>
<td>CASE MGR EX</td>
<td>PSS</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.00000</td>
<td>Exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>06/10/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>PCS</td>
<td>SYS Update - Probation Complete</td>
<td>Primary</td>
<td>007879</td>
<td>CASE MGR EX</td>
<td>PSS</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.00000</td>
<td>Exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>05/17/2020</td>
<td>1</td>
<td>Posn Chg</td>
<td>RTC</td>
<td>Reports To Change</td>
<td>Primary</td>
<td>007879</td>
<td>CASE MGR EX</td>
<td>PSS</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.00000</td>
<td>Exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>05/17/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>CNV</td>
<td>CONV: Conversion row</td>
<td>Primary</td>
<td>007879</td>
<td>CASE MGR EX</td>
<td>PSS</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.00000</td>
<td>Exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>12/09/2019</td>
<td>2</td>
<td>Data Chg</td>
<td>DIS</td>
<td>CONV: Distribution Begin Date</td>
<td>Primary</td>
<td>007879</td>
<td>CASE MGR EX</td>
<td>PSS</td>
<td>Active</td>
<td>Fixed</td>
<td>40.00</td>
<td>1.00000</td>
<td>Exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>12/09/2019</td>
<td>1</td>
<td>Transfer</td>
<td>CNV</td>
<td>Used for Conversion</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
<td>N/A</td>
<td>Active</td>
<td>System Default - Select Value</td>
<td>0.01</td>
<td>Exempt</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>12/09/2019</td>
<td>0</td>
<td>Hire</td>
<td>CNV</td>
<td>Conversion Use Only</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
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<td>Active</td>
<td>System Default - Select Value</td>
<td>0.01</td>
<td>Exempt</td>
<td></td>
</tr>
</tbody>
</table>
You can see the Effective Date of an auto-termination. (Person Org Summary shows you Last Day Worked)

<table>
<thead>
<tr>
<th>Organizational Relationship</th>
<th>Empid</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Actions</th>
<th>Action Reason</th>
<th>Description</th>
<th>Job Indicator</th>
<th>Job Code</th>
<th>Description</th>
<th>Classified Ind</th>
<th>Empid Status</th>
<th>Full/Part Time</th>
<th>Standard Hours</th>
<th>FTE</th>
<th>FLSA Status</th>
<th>Expected Job End Date</th>
<th>S P</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>0</td>
<td>07/01/2020</td>
<td>0</td>
<td>Terminate</td>
<td>JOB</td>
<td>Job Record End Date - Auto Term</td>
<td>Primary</td>
<td>002350</td>
<td>READER-GEHIP</td>
<td>Academic</td>
<td>Terminated</td>
<td>Variable</td>
<td>13.20</td>
<td>0.330000</td>
<td>Exempt</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>05/01/2020</td>
<td>1</td>
<td>Post Cng</td>
<td>RTC</td>
<td>Reports To Change</td>
<td>Primary</td>
<td>002000</td>
<td>READER-GEHIP</td>
<td>Academic</td>
<td>Active</td>
<td>Variable</td>
<td>13.20</td>
<td>0.330000</td>
<td>Exempt</td>
<td>06/20/2020</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>05/01/2020</td>
<td>0</td>
<td>Data Cng</td>
<td>GNV</td>
<td>CONV - Conversion row</td>
<td>Primary</td>
<td>002350</td>
<td>READER-GEHIP</td>
<td>Academic</td>
<td>Active</td>
<td>Variable</td>
<td>13.20</td>
<td>0.330000</td>
<td>Exempt</td>
<td>06/30/2020</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>04/01/2020</td>
<td>0</td>
<td>Data Cng</td>
<td>DIS</td>
<td>CONV - Distribution Begin Date</td>
<td>Primary</td>
<td>002350</td>
<td>READER-GEHIP</td>
<td>Academic</td>
<td>Active</td>
<td>Variable</td>
<td>13.20</td>
<td>0.330000</td>
<td>Exempt</td>
<td>06/30/2020</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>02/05/2020</td>
<td>1</td>
<td>Transfer</td>
<td>GNV</td>
<td>Used for Conversion</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
<td>N/A</td>
<td>Active</td>
<td>System Default - Selected Value</td>
<td>0.01</td>
<td>Exempt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>02/05/2020</td>
<td>0</td>
<td>Hire</td>
<td>GNV</td>
<td>Conversion Use Only</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
<td>N/A</td>
<td>Active</td>
<td>System Default - Selected Value</td>
<td>0.01</td>
<td>Exempt</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
A Rehire Template uses an existing inactive EMPL Records, makes it active again and uses it for the new job. You can see the previous job data rows beneath the Rehire row.

<table>
<thead>
<tr>
<th>Organizational Relationship</th>
<th>EMPL Record</th>
<th>Effective Date</th>
<th>Seq</th>
<th>Action</th>
<th>Action Reason</th>
<th>Description</th>
<th>Job Indicator</th>
<th>Job Code</th>
<th>Description</th>
<th>Classified Ind</th>
<th>Empl Status</th>
<th>Full/Part Time</th>
<th>Standard Hours</th>
<th>FTE</th>
<th>FLSA Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP</td>
<td>0</td>
<td>09/08/2020</td>
<td>1</td>
<td>Data Chg</td>
<td>BNE</td>
<td>Benefits: Update Eligibility</td>
<td>Primary</td>
<td>004920</td>
<td>STDT 3</td>
<td>PSS</td>
<td>Active</td>
<td>Variable</td>
<td>29.00</td>
<td>0.500000</td>
<td>None-exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>09/08/2020</td>
<td>0</td>
<td>Rehire</td>
<td>REH</td>
<td>Rehire, &gt; or = 120 days break</td>
<td>Primary</td>
<td>004920</td>
<td>STDT 3</td>
<td>PSS</td>
<td>Active</td>
<td>Variable</td>
<td>29.00</td>
<td>0.500000</td>
<td>None-exempt</td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>01/05/2020</td>
<td>0</td>
<td>Terminatin</td>
<td>AAJ</td>
<td>Resign - Accept Another Job</td>
<td>Primary</td>
<td>004920</td>
<td>STDT 3</td>
<td>PSS</td>
<td>Terminated</td>
<td>Variable</td>
<td>0.01</td>
<td>None-exempt</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/25/2017</td>
<td>1</td>
<td>Transfer</td>
<td>CNV</td>
<td>Used for Conversion</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
<td>N/A</td>
<td>Active</td>
<td>System Default - Select Value</td>
<td>0.01</td>
<td>None-exempt</td>
<td></td>
</tr>
<tr>
<td>EMP</td>
<td>0</td>
<td>10/25/2017</td>
<td>0</td>
<td>Hire</td>
<td>CNV</td>
<td>Conversion Use Only</td>
<td>Primary</td>
<td>CONV</td>
<td>CONVERSION JOB CODE</td>
<td>N/A</td>
<td>Active</td>
<td>System Default - Select Value</td>
<td>0.01</td>
<td>None-exempt</td>
<td></td>
</tr>
</tbody>
</table>
Do not enter very future-dated rows
  - Because circumstances might change and you may need to have UCPC remove the row, or if you forget the future-dated row is there and it is no longer applicable it will cause issues

The Medical Center has established best practices for the Effective Date for Reports To changes; our team is working with Campus EcoTime to understand the impact of the Effective Date on Reports To changes (more to come!)

Assign one Action/Reason Code (one transaction) per data change, when possible
  - Example: Reclassification with associated Pay Rate Change is two updates in a single PayPath transaction

Check your work

Check UCPC’s work
Data Forms

- When to use data forms
- What to fill out in data forms
The Position Update Form is required if **Effective Date** is:

- Equal to the Effective Date on an existing row
- Prior to Conversion
- Equal to the Conversion Date
- Prior to the most current effective-dated row*
- Or, if you need to change the Effective Date on an existing row

*PayPath will allow the use of **Effective Dates** that are prior to the current row and should cascade that update “forward” to all existing rows with a later **Effective Date**. However, we recommending confirming the cascade forward. Enter the transaction and review WJS. If needed, submit an update form to update your future-dated row(s).
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
- When changing an Effective Date

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

*PayPath will allow the use of **Effective Dates** that are prior to the current row and should cascade that update “forward” to all existing rows with a later **Effective Date**. However, we recommending confirming the cascade forward. Enter the transaction and review WJS. If needed, submit an update form to update your future-dated row(s).
The UCRS Job History Update Form is required if a pay-impacting update of Job Data has an effective date prior to Conversion.

- Only used to correct Job Data in conjunction with retro pay.
- You will still need to do a PayPath Job Data update if the update should apply to post-conversion dates.
- Do not use this form for pre-conversion FTE changes, use the Position Update Form instead.
What To Fill Out in Data Forms

- Fields with a red * are required – these help UCPC identify the row you want them to make a change to
- Otherwise, only fill out the fields that need to be changed
- Do not fill out every field in the form 😊
Scenarios

- Scenarios to consider
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: I identified an employee whose job should have started 4/15. They received no 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 because it is technically a “missed pay” scenario; 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: NOT Saved to Database

**SCENARIO:** Sometimes an initiator is able to submit a transaction without any error messages and a PayPath approver is also able to approve it and the Request Status saves as NOT Saved to Database.

**What To Do:**

- Review Workforce Job Summary to see if the update saved.
- If the update did not save, you should examine why it might not have to see if you should make the update differently:
  - Example: You used an Effective Date that already exists for Position Data (usually you get a hard stop error, but other Locations saw this as an issue)
- You can also try submitting the transaction again.
- If all else fails, submit a Position or Job Data Update form to ask UCPC to make the update.
Scenario: FTE + Comp Rate Increase Post Conversion

**SCENARIO:** Today is 7/28. A monthly employee currently has FTE = .3 and Monthly Compensation Rate = $10,000. Effective 7/1, the employee should have FTE = 1.0 and Monthly Compensation Rate = $15,000. Deadline for the 7/31 paycheck has already past.

The 8/1 paycheck will pay the employee .3 x $10,000 = $3,000
The 8/1 paycheck *should have* paid the employee 1.0 x $15,000 = $15,000
**The difference owed to the employee is $12,000**

**SOLUTION:** Make required PayPath updates then submit an Off-Cycle Payroll Request for the “missing pay” portion.

1. Enter a PayPath update, with Effective Date = 7/1
   - On the Position Data tab, Reason = Permanent Increase in Time, FTE = 1.0
   - On the Job Data tab, Action = PAY, select appropriate reason, Annual Comp Rate = $180,000
     (Monthly Comp will equal $15,000)
   - The Retro Module will trigger for the increase in Compensation:
     - Employee was paid .3 x $10,000 = $3,000
     - Employee should have been paid .3 x $15,000 = $4,500
     - **Difference/Retro to be paid on the 9/1 paycheck = $1,500**

2. Off cycle pay request for the amount owed for the increase in FTE
   - .7 FTE for one month at $15,000 = $10,500
Scenario: Employee is currently a Postdoc Employee. This employee should have a Fellowship appointment effective 7/1.

- From 7/1 – 8/11 the employee should be 100% Fellowship, 0% Employee
- From 8/12 onward, the employee should be 94% Fellowship, 6% Employee
- The employee is overpaid on the Employee job and underpaid on the Fellowship job

This is the Employee Job before any changes
1. We need to add a 7/1 row with FTE = 0
2. The 8/12 rows need to have the FTE = 0.06
Scenario: Employee is currently a Postdoc Employee. This employee should have a Fellowship appointment effective 7/1.
- From 7/1 – 8/11 the employee should be 100% Fellowship, 0% Employee
- From 8/12 onward, the employee should be 94% Fellowship, 6% Employee
- The employee is overpaid on the Employee job and underpaid on the Fellowship job

System Steps – What we thought would work
- Submit a Concurrent Hire effective 7/1 for the Fellowship appointment with 1.0 FTE
- Once the Fellowship hire is processed, update the FTE effective 8/12
- Update Employee job FTE:
  - Submitted a Position Update form for 7/1 update because it’s prior to the most current-effective dated row
  - Submitted a Position Data Update forms to update FTE on 8/12 because there is an existing 8/12 row
- Process off-cycle pay for pay missed on the Fellowship job
- Initiate an Overpayment request for the pay received on the Employee job from 7/1 – 8/11, and for the amount overpaid since 8/12, as well

System Steps – What we should have done
- Submit a Concurrent Hire effective 7/1 for the Fellowship appointment with 1.0 FTE
- Once the Fellowship hire is processed, update the FTE effective 8/12
- Update Employee job FTE:
  - Enter 7/1 FTE change to 0 and confirm it cascades forward to all rows (it will cascade to the 8/12 row too)
  - Submit a Position Data Update form to update FTE on 8/12 because there is an existing 8/12 row
- Process off-cycle pay for pay missed on the Fellowship job
- Initiate an Overpayment request for the pay received on the Employee job from 7/1 – 8/11, and for the amount overpaid since 8/12, as well
What actually happened:

- Tried submitting a Position Update form for 7/1 update because it’s prior to the most current-effective dated row, but UCPC kicked back and said to enter via PayPath.
- Submitted a Position Data Update form to update FTE on 8/12 because there is an existing 8/12 row; this was processed by UCPC successfully.
- The forms were submitted at the same time, and the FTE change on the 8/12 rows was processed by UCPC before the 7/1 PayPath update.
- The PayPath updated effective 7/1 to change the FTE to 0 saved correctly and cascaded forward to all rows.
- This means the transactor had to do another Position Data Update form for the FTE update for 8/12.
**SCENARIO:** Intra-Location Transfer for a promotion and change in Department. On the job record, there was a row with a date LATER than the Transfer Effective Date (later than 7/13). UCPC is supposed to assess the record and remove/update future-dated rows before processing the transfer, but they didn’t. The result was that the future dated row from the previous job stayed on the record and, on the Effective Date on that row, the job reverted to the old job (old Position, old benefits, etc.).

Imagine a row right here with an 7/14 Effective Date and ALL the old Position and Job Data

<table>
<thead>
<tr>
<th>EMP</th>
<th>Date</th>
<th>Transfer</th>
<th>Promotion</th>
<th>Effective Date</th>
<th>Job Code</th>
<th>Position</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMP 1</td>
<td>07/13/2020</td>
<td>0</td>
<td>Transfer</td>
<td>07/13/2020</td>
<td>CNFT12012</td>
<td>MSP</td>
<td>Active</td>
</tr>
<tr>
<td>EMP 1</td>
<td>07/13/2020</td>
<td>0</td>
<td>Data Chg</td>
<td>07/13/2020</td>
<td>CONV</td>
<td>MSP</td>
<td>Active</td>
</tr>
<tr>
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</tbody>
</table>
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 as you anticipated – some PayPath Transactions do not save to the database and approvers will see this error
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 or is on **UCWOS**

Check for the NOT Saved to Database error
If you process a hire with 0 FTE in error, submit a position data update effective the hire date with the correct FTE.

How do you delete a row? Only UCPC can delete a row and you request that using a Position or Job Data Update form.

I was told by Payroll, that if an employee has missing pay and was overpaid for the same job but different pay periods, I should still do two separate transactions (Off-cycle paycheck request and Overpayment request). Yes, I am sorry 😞

I submitted a concurrent hire when I should have processed a full hire. paypath is showing the action but it is not accurate. What do I need to do, ticket to path center? Submit a ticket to UCPC.

Can you help me understand how to process an underpayment/missed pay on one job and overpayment on another? Treat them as independent – one off cycle for job one and one overpayment for job two.

I need to enter an LVL and PIT actions on Position Data on the same effective date. We're only allowed to enter 1 position data change per effective date. How do I accomplish this? I need to update the FTE and the salary grade on the Position Data tab. Suggest single transaction under LVL action and reason since these are often changes that are linked in real life.
Is there a way to update the auto term button for a CWR after it has been submitted or will I need to process a Term when the appointment ends? I don’t think there is an auto-term option for CWRs.

I am working on a hire transaction where the job code is normally exempt, but its being set up as non-exempt due to the FTE and salary. I noticed that in the Job Compensation - Payroll Currency and Frequency section it defaults to "M" is it possible to override this to Hourly? Make sure you’ve already done the FLSA override on the vacant position. Then you can override the Comp Frequency and set up the associated correct Comp (e.g., UCHRLY). Be REALLY explicit about the changes you’ve made in the comments to UCPC, and request the correct Paygroup.

I need to rehire a former TA into a staff position. She is currently terminated in UCPath but when I tried to do the rehire template for UC REHIRE (Staff), it was not allowing me to pull up her ID#. Then tried as a UC REHIRE AC which allowed me to access her but I was not able to pull up her new job position. You need to use a full hire with the correct Reason Code.