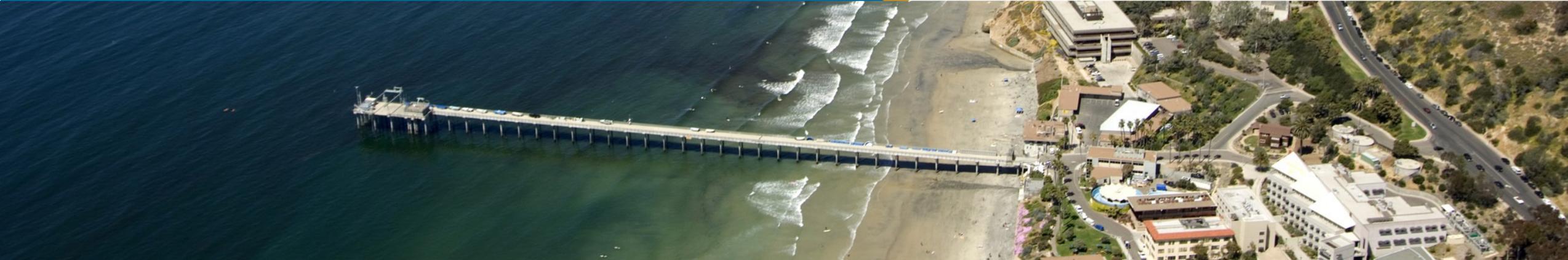




Topic Based Zoom:
Position vs Job Updates

12/1/21



Today's Topics



Review Key Terms & Concepts

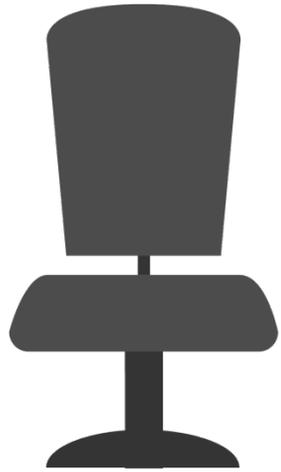


Scenarios & Best Practices



Q&A

POSITION



Independent of employee

Position Data

Department, Job Code, FTE, etc.

PERSON



An employee

Personal Data

Name, Date of Birth, Address, etc.

JOB



The joining together of a position and person

Job Data

Employee Class, Compensation Rate, Step, Additional Compensation, etc.

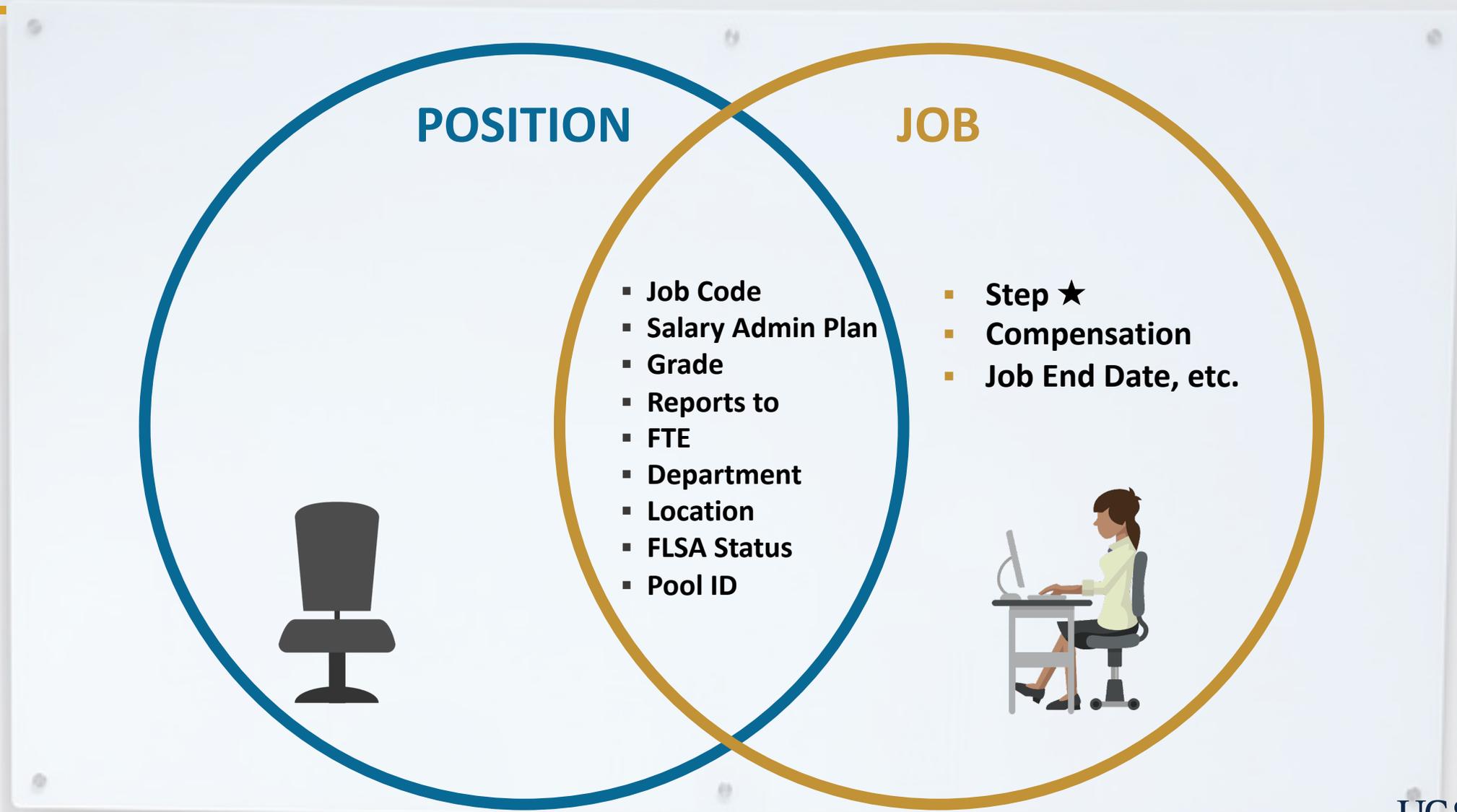
Position + Job + Personal Data

Position Data establishes key data elements and establishes departmental structure. Position Data is maintained whether a position is filled or vacant.

Personal Data refers to an employee's biographical data stored in UCPATH.

Job Data refers to the specific details of an Employee's job including basic compensation details.

Relationship Between Position Data and Job Data



Position Data | Job Data | Additional Pay Data

Employee [redacted] Empl ID [redacted] Empl Record 0

[Position Data](#)

Position Number: [redacted] INFO SYS ANL 3 Action: POS Position Change
Effective Date: 11/30/2021 Position Change Reason: [redacted]

New Values to update	Existing Values
Business Unit: SDCMP UC San Diego Campus	Business Unit: SDCMP UC San Diego Campus
Department ID: 000444 INFORMATION TECHNOLOGY SVCS	Department: 000444 INFORMATION TECHNOLOGY SVCS
Location: VCCFO VC-CHIEF FINANCIAL OFFICER	Location: VCCFO VC-CHIEF FINANCIAL OFFICER
Job Code: 007309 INFO SYS ANL 3	Job Code: 007309 INFO SYS ANL 3
Union Code: 99 Non-Represented	Union Code: 99 Non-Represented
FLSA Status: Exempt	FLSA Status: Exempt
Reports To Position: [redacted] BUS SYS ANL 4	Reports To Position: [redacted] BUS SYS ANL 3
Sal Admin Plan: CTSD	Sal Admin Plan: CTSD
Salary Grade: 23	Salary Grade: 23
Standard Hours: 40.00	Standard Hours: 40.00
FTE: 1.000000	FTE: 1.000000

Mail Drop: [redacted]
Position Pool: [redacted]

Employee Relations Code: All Others, Not Confidential
Classified Indicator: Professional & Support Staff

Adds to FTE Actual Count:
Include FTE:
Representation Code: Covered Worksite ID: 6-000444

- Position Data can be updated on the Position Data Tab in PayPath for filled positions
- 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
 - Prior or equal to Conversion Date
 - Correcting the Effective Date

Position Update Form

Hyperlink to form instructions

UNIVERSITY OF CALIFORNIA UPath Center POSITION UPDATE FORM FR.050

Clear Form Validate Undo Highlight

The purpose of the Position Update Form is to submit position related corrections to the UPath Center and update the position data (and/or incumbent job data, if applicable) in UPath. [Click here](#) to access form instructions.

SECTION 1. KEY INFORMATION *Indicates Required Fields

Type of Update*	Position #*	Effective Date* (m/d/yyyy)	Reason Code*
Update Existing Row			

SECTION 2. POSITION INFORMATION

Business Unit*	Department #	Full / Part Time	Reports To Position #
		<input type="radio"/> Fixed <input type="radio"/> Variable	
Job Code	Union Code	Classified Indicator	FLSA Status
			<input type="radio"/> Exempt <input type="radio"/> Non-Exempt
Salary Admin Plan	Salary Grade	Standard Hours	FTE

SECTION 3. INCUMBENT INFORMATION

Empl ID# (8 Digits)	Last Name	First Name

SECTION 4. INITIATOR COMMENTS

Type Comments Below

SECTION 5. BUSINESS UNIT APPROVAL

Approval #1 – Type/Print Name*	Title*	Department*
Approval #1 Signature*	Date Approved* (m/d/yyyy)	

The retention schedule for this form can be found at <http://recordsretention.ucop.edu/>.

Revised: 1/25/2018 Page 1 of 2

UNIVERSITY OF CALIFORNIA UPath Center POSITION UPDATE FORM FR.050

Clear Form Validate Undo Highlight

Approval #2 – Type/Print Name	Title	Department
Approval #2 Signature	Date Approved (m/d/yyyy)	
Approval #3 – Type/Print Name	Title	Department
Approval #3 Signature	Date Approved (m/d/yyyy)	

SECTION 6. UCPath CENTER INTERNAL USE ONLY

Processed By	Completion Date (m/d/yyyy)

The retention schedule for this form can be found at <http://recordsretention.ucop.edu/>.

Revised: 1/25/2018 Page 2 of 2

Add the employee's information here

Position Data **Job Data** Additional Pay Data

Employee Empl ID 1 Empl Record 0 [Funding Entry Page](#)

Staff: Career HR Status: Active Payroll Status: Active [Work Force Job Summary](#)
[Person Org Summary](#)

Job Data

Find | View All First 1 of 1 Last

Effective Date: 11/30/2021 Action:

Effective Sequence: 0 Action Reason:

Current Effective Date: 07/22/2021 Current Action: POS Position Change
Current Eff Sequence: 0 Current Action Reason: RTC Reports To Change

Position Number: INFO SYS ANL 3
Business Unit: SDCMP UC San Diego Campus
Department: 000444 INFORMATION TECHNOLOGY SVCS
Location Code: VCCFO VC-CHIEF FINANCIAL OFFICER
Job Code: 007309 INFO SYS ANL 3
Union Code: 99 Non-Represented

Reports To Position Number:

FLSA Status: Exempt

Salary Administration Plan: CTSD Establishment ID: UCSD UC San Diego
Step:

Salary Grade: 23 Employee Class: 2 Staff: Career
FTE: 1.000000

Appointment End Date:

Earnings Distribution Type: None Comp Rate: 7,953.000000 Standard Hours: 40.00 Pay Frequency: M Monthly

Pay Components

Personalize | Find | | First 1 of 1 Last

Rate Code	Comp Rate	Compensation Frequency
1 UCANNL	95,436.000000	Annual

Earnings Distribution

Personalize | Find | | First 1 of 1 Last

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt:

Probation Code: None

Location Use End Date:

Location Use Type:

Trial Employment End Date:

PY Career Duration:

Probation End Date:

Cubicle:

Job Data Comments:

- Job Data can be updated on the Job Data Tab in PayPath
- The **Job Data Update Form** is required if the update needed in Job Data is because:
 - **Effective sequencing can't be used to make the correction on the row**
 - **Has an effective date equal to the Hire Date**
 - **To change the effective date of an action, e.g. hire or termination**

SECTION 1

- Indicate row in Job Data which requires an update
- Types of updates: Adding a New Row, Updating Existing Row, Removing an Existing Row, Correcting Effective Dates, Correcting Action/Reason Codes

Workforce Job Summary

EMP Empl ID

Empl Status Active Hire Date 08/13/2012

Go To Job Data

Job Information Personalize Find First 1-7 of 7 Last

General	Job Information	Work Location	Salary Plan	Compensation	UC Job		
Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Description	Job Indicator
EMP	0	08/24/2020	0	Return-LOA	RFL	Return From Leave	Primary
EMP	0	07/13/2020	0	Paid LOA	FAM	Family Care	Primary
EMP	0	05/01/2020	1	Posn Chg	RTC	Reports To Change	Primary
EMP	0	05/01/2020	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	0	07/01/2019	0	Data Chg	DIS	CONV: Distribution Begin Date	Primary
EMP	0	08/13/2012	1	Transfer	CNV	Used for Conversion	Primary

UCPath Center

JOB DATA UPDATE FORM

Clear Form Validate Undo Highlight

FR.107

The purpose of the Job Data Update Form is to submit job data related corrections to the UCPath Center and update the job data in UCPath. Click [here](#) to access form instructions.

SECTION 1. KEY INFORMATION *Indicates Required Fields

Employee ID #* (8 Digits)		Last Name*		First Name*	
Type of Update*	Empl Record #*	Job Indicator*	Effective Date* (m/d/yyyy)	Effective Sequence*	
Action*	Reason*				
Submitter Name*	Submitter Email*		Date Submitted* (m/d/yyyy)		

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**.

Solution

1. 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
2. If the employee was overpaid, submit a overpayment request or back out hours in Time and Attendance

SCENARIO: I forgot to update the Reports To on the position before hiring a new employee into the position.

Solution

1. Since Reports To is not pay impacting, update through Position Management using the current effective date

SCENARIO: Today is 12/1/21. A monthly employee currently has FTE = .5 and Monthly Compensation Rate = \$10,000. Effective 1/1/22, the employee should have FTE = 1.0 and Monthly Compensation Rate = \$20,000.

Solution

1. Enter a PayPath update, with Effective Date 1/1/22
 - On the Position Data tab, Action defaults to Position Change, Reason = Permanent Increase in Time, FTE = 1.0
 - On the Job Data tab, Action = PAY, select appropriate reason, Annual Comp Rate = \$240,000 (Monthly Comp will equal \$20,000)



Position Data is separate from Job Data but is used in Job Data

- Position Data fields include: Job Code, Salary Admin Plan, Grade, Reports To, FTE, Department, Location and FLSA Status
- Job Data fields include: Step, Compensation Rate, and Job End Date



Position Data is updated on the Position Tab in PayPath or Position Update Form or Position Management

Job Data is updated on the Job Data Tab in PayPath or the Job Data Update Form



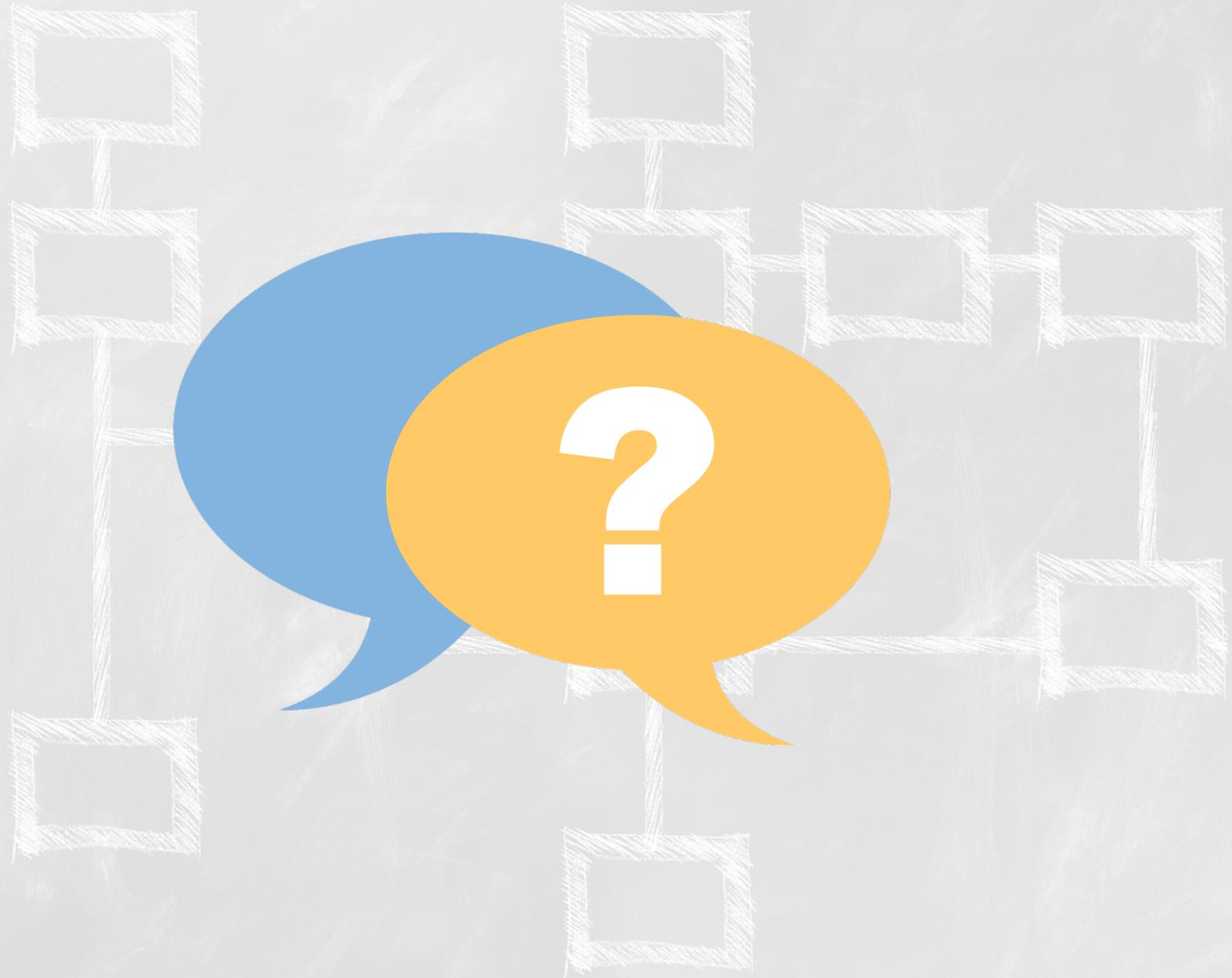
Pay Attention to Effective Dates

- Only one position data update can be submitted on any single Effective Date
- Effective Date of a job data change cannot be the same as the hire date; requires using the Job Update Form



Double check UCPC's work

- After you submit a transaction in UCPath check in Workforce Job Summary and Review Paycheck to make sure it was processed correctly



- When do you need to create a new Sequence. **Effective sequencing is only available for Job Data updates. Position updates can only use effective dates once.**
- what exactly does effective sequencing mean? **The effective sequence indicated in what order the data was input or changes on a particular effective date. You can correct an existing effective dated row by stacking another row on top using effective sequencing. When an effective sequence row is added that row becomes top of stack and will be used as of that effective date instead of any previous rows with that same effective date. There is no effective sequencing on position since you cannot reuse an effective date that has already been used for a position update.**
- Is it common for the employee's name to not be visible during the funding entry change despite their information being uploaded to the position? **If the position has been funded and the employee's hire date has already passed, you should be able to see the employee when you look them up on the Funding Entry Page. Please submit a SNOW ticket with examples of when this is happening so we can see why it the employee is not sometimes showing up for you.**
- Can we do RWB and extend an appointment in the same transaction? Also can we extend an appt and put on SWB in the same transaction? **Pay attention to the job end dates. You will need to extend the appointment before you do a RWB or SWB if the effective date of the RWB or SWB is after the job end date.**

- You mentioned position management update and position update in one of the slides- can you please clarify? **Positions that are filled should be updated through PayPath (or if the effective date has already been used the Position Update Form). Use Position Management for vacant positions or Reports To updates**
- So for the job data form you can use that to change the start date of a job? **Yes you will need to use the Job Data Update Form to change the hire effective date.**
- Can we use the "PeopleSoft - Add/Update Position Info" to correct the "Reports To" in UCPATH? **Correct! Position Management is the Add/Update Position page in UCPATH.**

The logo features the letters 'UC' in white on a gold rectangular background. To the right, the word 'Path' is written in a blue, italicized sans-serif font. This text is enclosed within a blue rectangular border that has a slight 3D effect. At the top right corner of this border, there is a blue trident symbol with three upward-pointing arrows.

UC *Path*

UC San Diego

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Health Sciences