

Workforce Administration

PHCMWFAL270: PayPath Transactions



Instructor

- ◆ Name
- ◆ UC role
- ◆ UCPATH role
- ◆ Years at UC
- ◆ Functional experience

Attendees

- ◆ Name
- ◆ University role
- ◆ Years at UC
- ◆ Expectations for this training

Training Logistics



Safety and Housekeeping

- ◆ Emergency evacuation procedures
- ◆ Restrooms
- ◆ Course duration: 4 hours
- ◆ Breaks

Classroom Etiquette

- ◆ Please turn off cell phones
- ◆ No email or web surfing
- ◆ Return from breaks on time
- ◆ Please use trash receptacles in the room

Parking Lot



- ◆ Parking Lot
 - ◆ Capture any questions or concerns that cannot be addressed during class
 - ◆ Provide follow up to all attendees of this class

Course Agenda

- 
- 1: PayPath Transactions Overview
 - 2: Position Data Changes
 - 3: Job Data Changes
 - 4: Additional Pay
 - 5: Combination Changes

Course Objectives



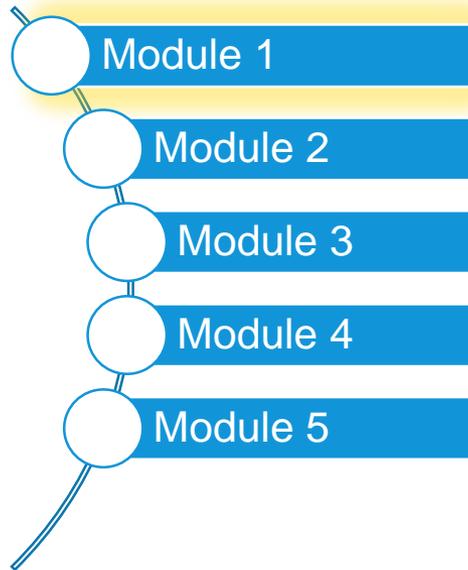
By the end of this course, you should be able to:

- ◆ Describe the PayPath Transaction system process.
- ◆ Describe the **PayPath Actions** entry pages.
- ◆ Describe the PayPath transaction action and reason codes.
- ◆ Initiate position data change PayPath transactions.
- ◆ Initiate job data change PayPath transactions.
- ◆ Initiate additional pay PayPath transactions.
- ◆ Initiate various PayPath combination transactions.

PayPath Transactions Overview

Module 1

Module Objectives



The module learning objectives are:

- ◆ Identify the transactions performed using **PayPath Actions**.
- ◆ Describe the PayPath Transaction system process.
- ◆ Identify the PayPath transaction action and reason codes.
- ◆ Describe the **PayPath Actions** entry pages.

PayPath Actions – Overview

- ◆ **PayPath Actions** is a custom component designed to streamline updates to employee data in UCPath.
- ◆ The **PayPath Actions** component provides intuitive, compliant functionality that is designed to meet UC's academic and staff requirements. This component offers a one-stop-shop for processing various types of transactions and the flexibility to submit multiple actions in a single transaction.
- ◆ PayPath integrates changes to position data, job data and additional pay, providing a tight integration between HR actions and funding requirements.
- ◆ The PayPath pages and fields that you typically update for an employee are grouped together in one component instead of having to navigate to each page separately.

Transactions Processed in PayPath Actions

The following types of transactions are processed for staff and academic employees using **PayPath Actions**.

PayPath Actions Transactions

Position Data Changes

Job Data Changes

Additional Pay

- ◆ Position data changes can be made only for positions that have a single active incumbent.
 - ◆ New or vacant positions must be created/updated using a **Position Control Request**. Multi-headcount positions must be updated by Position Administrators in the **Position Management** module.
 - ◆ You can still enter **Job Data** changes in **PayPath** for employees in multi-headcount positions.
- ◆ **PayPath Actions** is not used to hire, terminate, transfer to a new position or place employees on a leave of absence.

PayPath Actions – Examples

Examples of changes requested through **PayPath Actions**:

- ◆ Academic Merit, Promotion or Change in Series
- ◆ Position and/or Job Data FTE Changes
- ◆ Salary Only Changes / Pay Rate Changes
- ◆ Summer Compensation
- ◆ Change in Status from Without Salary (WOS) to Paid or Paid to WOS
- ◆ Short Work Break / Return from Short Work Break
- ◆ Abeyance / Return from Abeyance
- ◆ Changes to existing concurrent appointments
- ◆ Recurring Additional Pay Payments
- ◆ Retro Academic Merits, Promotions, Series Changes
- ◆ Phased Retirement or Employee Reduction In Time (ERIT)
- ◆ Probationary Status and Trial Employment Changes

PayPath Actions – Components

There are two **PayPath Actions** components, one for academic and one for staff. The appropriate component displays based on the type of employee selected.

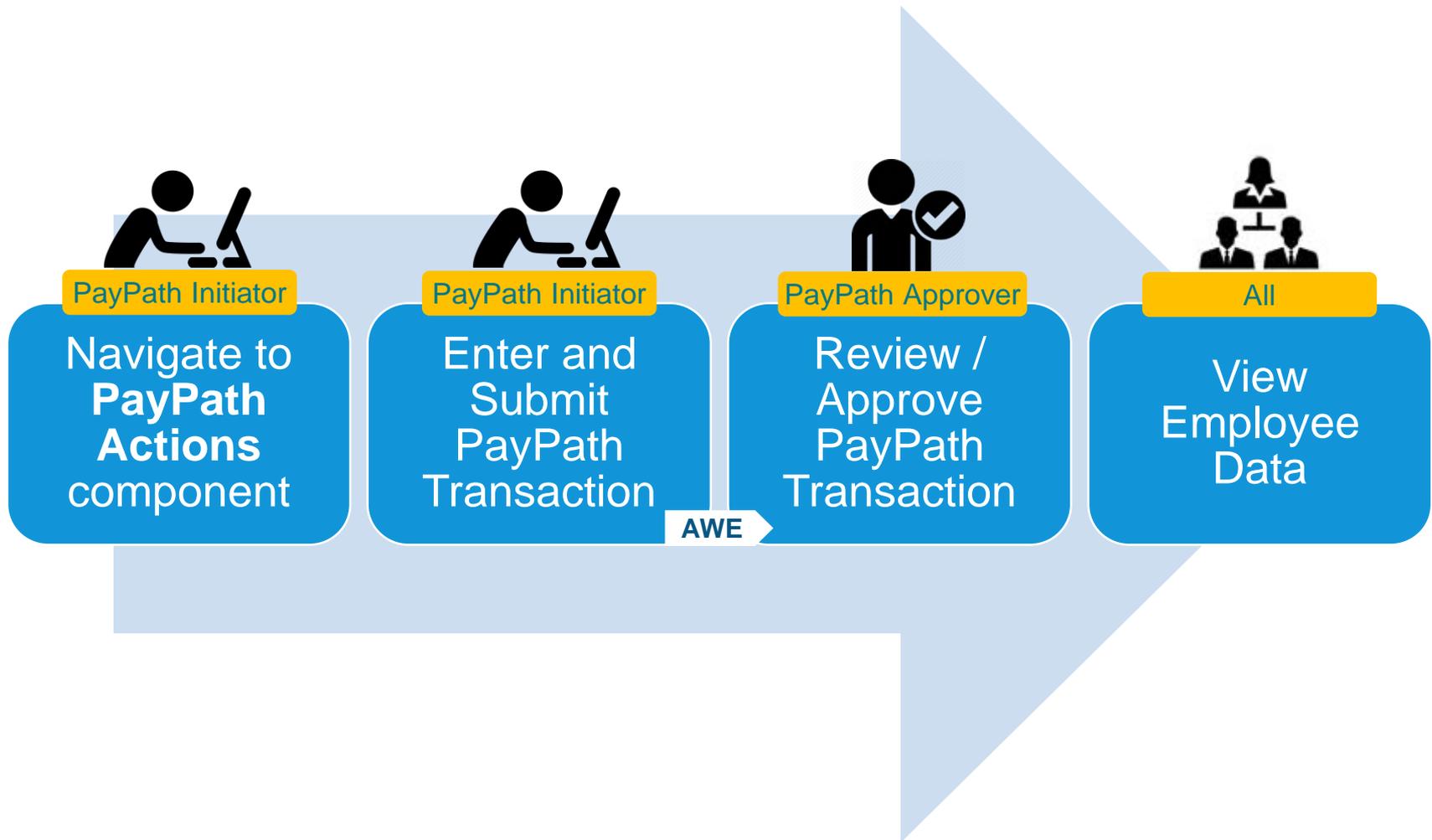
Some examples of the differences between Academic and Staff components:

Some fields display values as applicable for staff or academic. For example: position data and job data **Action/Action Reason** fields and valid **Comp Rate Codes**.

The **Employee Class** field is display-only for academic employees (derived from **Job Code**), versus editable for staff employees.

Job Data page, under **UC Job Data** section, different fields are visible as relevant to staff or academic. For example, staff employees have fields related to **Probation** and **Probation Date**, while academic employees have dates such as **Post Docs Anniversary Date** and **Academic Duration of Appt.**

PayPath Transaction – System Process



PayPath Actions AWE

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

The AWE approval routing for a **PayPath Actions** transaction is based on:

- ◆ Security role tied to the PayPath Initiator (for example: Central vs. Department).
- ◆ Approval routing configuration by Location. For example, number of approval levels required.

AWE security role assignment and approval routing configuration is determined by each Location's business process.

Introduction to PayPath Actions

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > PayPath Actions

Favorites ▾ Main Menu ▾ > UC Customizations ▾ > UC Extensions ▾ > PayPath Actions

ORACLE® Home | Worklist

PayPath Actions

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

▼ Search Criteria

Empl ID:

Empl Record:

Name:

Last Name: Allen

Business Unit:

Position Number:

Department:

Job Code:

Employee Classification:

Employee Status:

Case Sensitive

Search Results

[View All](#)

Empl ID	Empl Record	Name	Last Name	Business Unit	Position Number	Department	Department Description	Job Code	Job Code Description	Employee Classification	
10000077	0	Allen,Chen	Allen	UCOP1	40000157	805600	UNDERGRADUATE ADMISSIONS	005883	PROJECT POLICY ANL 4 GF	2	Staff: C
10000607	0	Allen,Todd Kathleen	Allen	UCOP1	40000492	822000	CHIEF INV OFFICER IMM OFFICE	000230	FIXED INCOME INV DIR	2	Staff: C
10000888	0	Allen,Kimberly Tinsley	Allen	UCOP1	40001270	815800	RETIREMENT ADMIN SV CTR (RASC)	004737	RET CUSTOMER SVC REPR 2	2	Staff: C
10001410	0	Allen,Yon Dohn M.	Allen	UCOP1	40002109	813400	RISK SERVICES	007205	ENTERPRISE RISK MGT ANL 4 2	2	Staff: C
10001679	0	Allen,Daniel	Allen	UCOP1	40000002	809000	VICE PROV ACAD PERS IMMED OFC	000261	LABOR REL REPR 5	2	Staff: C

Enter search criteria to locate the employee. In this example, a search was performed on the **Last Name Allen**.

If only one employee matches the search criteria entered, the **PayPath Actions** component opens and displays the employee.

If multiple employees match the search criteria entered, those employees display in the **Search Results**.

PayPath Actions Component

The **PayPath Actions** component is comprised of three pages: **Position Data**, **Job Data** and **Additional Pay Data**. Navigate to the appropriate page to enter the related update.

- ◆ It is not necessary to complete all tabs for every transaction.
 - ◆ For example, to extend an employee's **Appointment End Date**, go directly to the **Job Data** tab.

Position Data | Job Data | Additional Pay Data

Chen Allen Employee Empl ID 1000077 Empl Record 0 [Position Data](#)

Position Data

Position Number: 40000157 PROJECT POLICY ANL 4 GF Action: POS Position Change
Effective Date: 07/31/2017 Position Change Reason:

New Values to update		Existing Values	
Business Unit: UCOP1	UC Office of President	Current Effective Date: 10/17/2016	Business Unit: UCOP1 UC Office of President
Department ID: 805600	UNDERGRADUATE ADMISSIONS	Department: 805600	UNDERGRADUATE ADMISSIONS
Location: FRANKLIN	UCOP - Franklin Building	Location: FRANKLIN	UCOP - Franklin Building
Job Code: 005883	PROJECT POLICY ANL 4 GF	Job Code: 005883	PROJECT POLICY ANL 4 GF
Union Code: 99	Non-Represented	Union Code: 99	Non-Represented
FLSA Status: Exempt		FLSA Status: Exempt	
Reports To Position: 40000093	ADMISSIONS RECRMT MGR 3	Reports To Position: 40000093	ADMISSIONS RECRMT MGR 3

PayPath Actions – Position Data Page

Position Data | Job Data | Additional Pay Data

Chen Allen Employee Empl ID 1000077 Empl Record 0

Position Data

Position Number: 40000157 PROJECT POLICY ANL 4 GF Action: POS Position Ch

Effective Date: 07/31/2017 Position Change Reason:

New Values to update	Existing Values
Business Unit: UCOP1 UC Office of President	Current Effective Date: 10/17/2016
Department ID: 805600 UNDERGRADUATE ADMISSIONS	Business Unit: UCOP1
Location: FRANKLIN UCOP - Franklin Building	Department: 805600
Job Code: 005883 PROJECT POLICY ANL 4 GF	Location: FRANKLIN
Union Code: 99 Non-Represented	Job Code: 005883
FLSA Status: Exempt	Union Code: 99
Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3	FLSA Status: Exempt
Sal Admin Plan: CTOP	Reports To Position: 40000093 ADMISSIONS RECRMT MGR 3
Salary Grade: 23	Sal Admin Plan: CTOP
Standard Hours: 40.00	Salary Grade: 23
FTE: 1.000000	Standard Hours: 40.00
	FTE: 1.000000

Mail Drop: 712348 Adds to FTE Actual Count:

Position Pool:

Employee Relations Code: All Others, Not Confidential Include FTE:

Representation Code: Covered

Classified Indicator: Management & Sr Professional

[Return to Search](#)

Position Data | Job Data | Additional Pay Data

Use the **Position Data** page to enter changes to position data.

The **Position Data** page provides two areas:

New Values to update and **Existing Values**.

This allows you to compare the existing position information while you enter the updated information.

If the employee is in a multi-headcount position the fields on the **Position Data** page are view-only and you cannot enter position changes; however, you can still enter **Job Data** changes.

PayPath Actions – Job Data Page

Position Data **Job Data** Additional Pay Data

Chen Allen Employee Empl ID 1000077 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: 07/31/2017 Action:
 Effective Sequence: 0 Action Reason:

Current Effective Date: 10/17/2016 Current Action: POS Position Change
 Current Eff Sequence: 0 Current Action Reason: RTC Reports To Change

Position Number: 40000157 PROJECT POLICY ANL 4 GF
 Business Unit: UCOP1 UC Office of President
 Department: 805600 UNDERGRADUATE ADMISSIONS
 Location Code: FRANKLIN UCOP - Franklin Building
 Job Code: 005883 PROJECT POLICY ANL 4 GF
 Union Code: 99 Non-Represented
 Reports To Position Number: 40000093 ADMISSIONS RECRMT MGR 3 10001557 Annette Gil
 FLSA Status: Exempt
 Salary Administration Plan: CTOP Establishment ID: UC Office of the President
 Salary Grade: 23 Step:
 FTE: 1.000000 Employee Class: Staff: Career
 Appointment End Date:

Earnings Distribution Type: None Comp Rate: 7,846.917500 Standard Hours: 40.00 Pay Frequency: Monthly

Pay Components Personalize | Find | | First 1 of 1 Last

Rate Code	Comp Rate	Compensation Frequency
1 UCANNL	94,163.010000	Annual

Earnings Distribution Personalize | Find | | First 1 of 1 Last

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt: Trial Employment End Date:
 Probation Code: PY Career Duration:
 Location Use End Date: Probation End Date:
 Location Use Type:

Job Data Comments:

Position Data | Job Data | Additional Pay Data

Use the **Job Data** page for various job data changes. Some of the fields and values available on the **Job Data** page change depending on whether the employee is an academic or staff employee.

PayPath Actions – Additional Pay Data Page

Position Data | Job Data | **Additional Pay Data**

Chen Allen Employee Empl ID 10000077 Empl Record 0

No Data present for current Additional Pay

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

*Earnings Code:

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 07/31/2017

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: Reason: Not Specified

Pay Period Amt:

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$7,846.917500 Frequency: Monthly

Default Job Data

Position: 40000157 PROJECT POLICY ANL 4 GF

Business Unit: UCOP1 UC Office of President

Department: 805600 UNDERGRADUATE ADMISSIONS

Job Code: 005883 PROJECT POLICY ANL 4 GF

FTE: 1.000000

Employee Status: Active Expected Job End Date:

Save for Later Save And Submit Cancel Upload | View Supporting Documents

Transaction ID NEW

Workflow Status **Approv Prc**

Request Status **In Progress**

Initiator's Comments

User ID

Return to Search

Position Data | Job Data | Additional Pay Data

Use the top portion of the **Additional Pay Data** page to enter or update additional pay information for an employee. If the employee has current additional pay information, it appears on the right side of the page.

The middle section provides details about the employee's current **Job Information**.

The bottom portion of the page applies to the entire PayPath transaction, not just the currently displayed tab.

Use the bottom portion of this page to:

- Save the transaction for later processing, submit the transaction for approval or cancel the transaction.
- Upload or view supporting documents.
- View the **Transaction ID, Workflow Status and Request Status and User ID**.
- Enter comments to the Approver.
- Return to the search page.

PayPath Actions – Effective Dates

- ◆ Each PayPath transaction allows only one **Effective Date**.
 - ◆ For example, you may have one change for **Position Data** and multiple changes for **Job Data**; however, all changes must have the same **Effective Date**.
 - ◆ UCPATH displays a warning message if you try to enter multiple effective dates in a single transaction.
 - ◆ After you enter the **Effective Date** on one of the tabs, the **Effective Date** field becomes view-only on the other tabs and on new rows.
 - ◆ If you have changes for multiple effective dates, you must enter a separate PayPath transaction for each effective date. Also, you must wait until the first PayPath transaction has completed the approval process before entering the next transaction.
- ◆ Exception for **Additional Pay Data** tab:
 - ◆ You can enter multiple **Effective Dates** on the **Additional Pay Data** tab only.

Retroactive Changes

- ◆ Changes can be entered retroactively for **Position Data** and **Job Data**.
 - ◆ If a retro date is prior to your Locations UCPATH conversion date, it must be submitted to UCPATH Center via a case.
- ◆ After the change is approved, it is saved to UCPATH and the update is applied to the appropriate component in the appropriate row according to the **Effective Date**.
- ◆ For position and job updates, all rows of data after the retro change are also updated.
- ◆ The **PayPath Actions** pages display the latest effective dated row. Keep in mind that this could be a future dated row.
 - ◆ To view all rows of employee data, access the **Workforce Job Summary** page directly from the PayPath Actions **Job Data** page.

PayPath Transactions – Action Reason Codes

- ◆ **Action** and **Action Reason** codes further define the purpose of position data change and job data change transactions.
- ◆ You must specify the appropriate **Action** and **Action Reason** codes when a PayPath transaction is initiated.
 - ◆ For **Position Data** there is only one **Action: POS**.

The screenshot displays the PayPath system interface for employee **Chen Allen**. The interface is divided into tabs: **Position Data**, **Job Data**, and **Additional Pay Data**. The **Job Data** tab is active, showing the following information:

- Employee:** Chen Allen (Staff: Career)
- Empl ID:** 10000077
- Empl Record:** 0
- HR Status:** Active
- Payroll Status:** Active
- Effective Date:** 07/31/2017
- Effective Sequence:** 0
- Current Effective Date:** 10/17/2016
- Current Eff Sequence:** 0
- Position Number:** 40000157
- Project Policy:** ANL 4 GF

The **Action** and **Action Reason** fields are highlighted with a red box. The **Action** field is currently empty, and the **Action Reason** field is currently empty. The **Current Action** is **POS** (Position Change) and the **Current Action Reason** is **RTC** (Reports To Change).



PayPath Transactions – Action Codes, Reason Codes and Descriptions

- ◆ This is your opportunity to review the job aid.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.
- ◆ Ask your instructor for assistance.

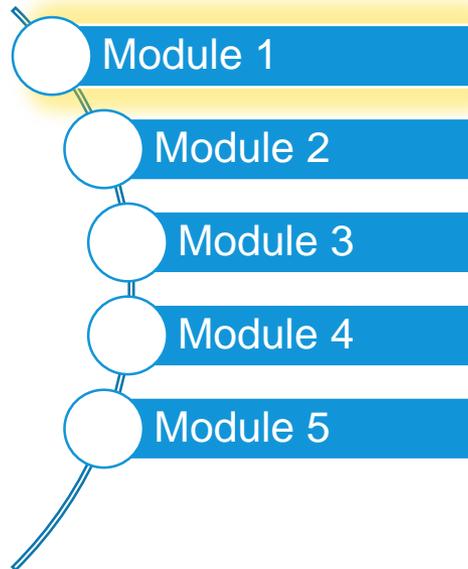
PayPath – Important Notes

- ◆ After a PayPath transaction is submitted for approval (**Pending** status), you cannot enter another PayPath transaction for that employee record until the transaction has been processed by all Approvers.
- ◆ PayPath is accessed by employee record; therefore, if an employee has more than one job, each record has to be updated separately.
- ◆ PayPath allows historic, current or future updates for **Position Data** and **Job Data**.

Position Data Reminder – Who does What and Where

Who	Role: Position Control Initiator	Role: PayPath Initiator	Role: Position Administrator	Role: UCPath Center WFA Production
Where	Position Control Request	PayPath Actions	Position Management (Add/Update Position Info)	Position Management (Add/Update/Correct Position Info)
What	Used to request a new position. And to request an update to a <u>vacant</u> position. Initiates AWE.	Used to update position data for positions that have a single incumbent. Initiates AWE.	Used to add and update position data including multi-headcount positions. Does not initiate AWE.	Used to add, update and correct position data. Does not initiate AWE.

Module Objectives Review



Having completed this module, you should be able to:

- ◆ Identify the transactions performed using **PayPath Actions**.
- ◆ Describe the PayPath Transaction system process.
- ◆ Identify the PayPath transaction action and reason codes.
- ◆ Describe the **PayPath Actions** entry pages.

Module Review

Introduction

- ◆ You now have the opportunity to assess your knowledge of the information presented in this module.
- ◆ The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Multiple Choice



Transactions that are initiated using the **PayPath Actions** component include:

- A. Position Data Changes
- B. New Hires
- C. Job Data Changes
- D. All of the above
- E. A and C

True or False



All **PayPath Actions** transaction are routed for approval using the Approval Workflow Engine (AWE).

True.

True or False



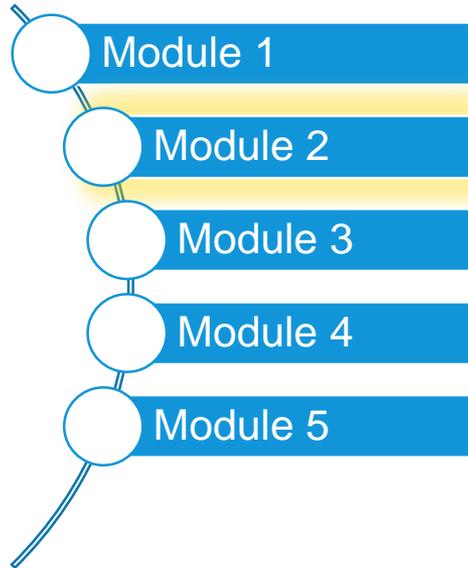
An **Action** and **Action Reason** code is needed only for pay rate job data changes.

False. An **Action** and an **Action Reason** code must be entered for every **Job Data** change transaction.

Position Data Changes

Module 2

Module Objectives



The module learning objectives are:

- ◆ Describe the key system steps to complete a position data change PayPath transaction.
- ◆ Initiate position data change PayPath transactions.

Position Data Changes – Overview

Position data changes can be initiated for filled positions where only one employee is assigned to the position.

- ◆ The **PayPath Actions** search page restricts you from accessing a position that is vacant. The system displays a message: *“No matching values. You have entered a position number that is vacant.”*
- ◆ The **Position Data** page appears in display-only mode if the employee selected is in a multi-headcount position, therefore restricting any position data updates.
 - ◆ You can still enter **Job Data** updates for employees in a multi-headcount position.

Position Data Changes

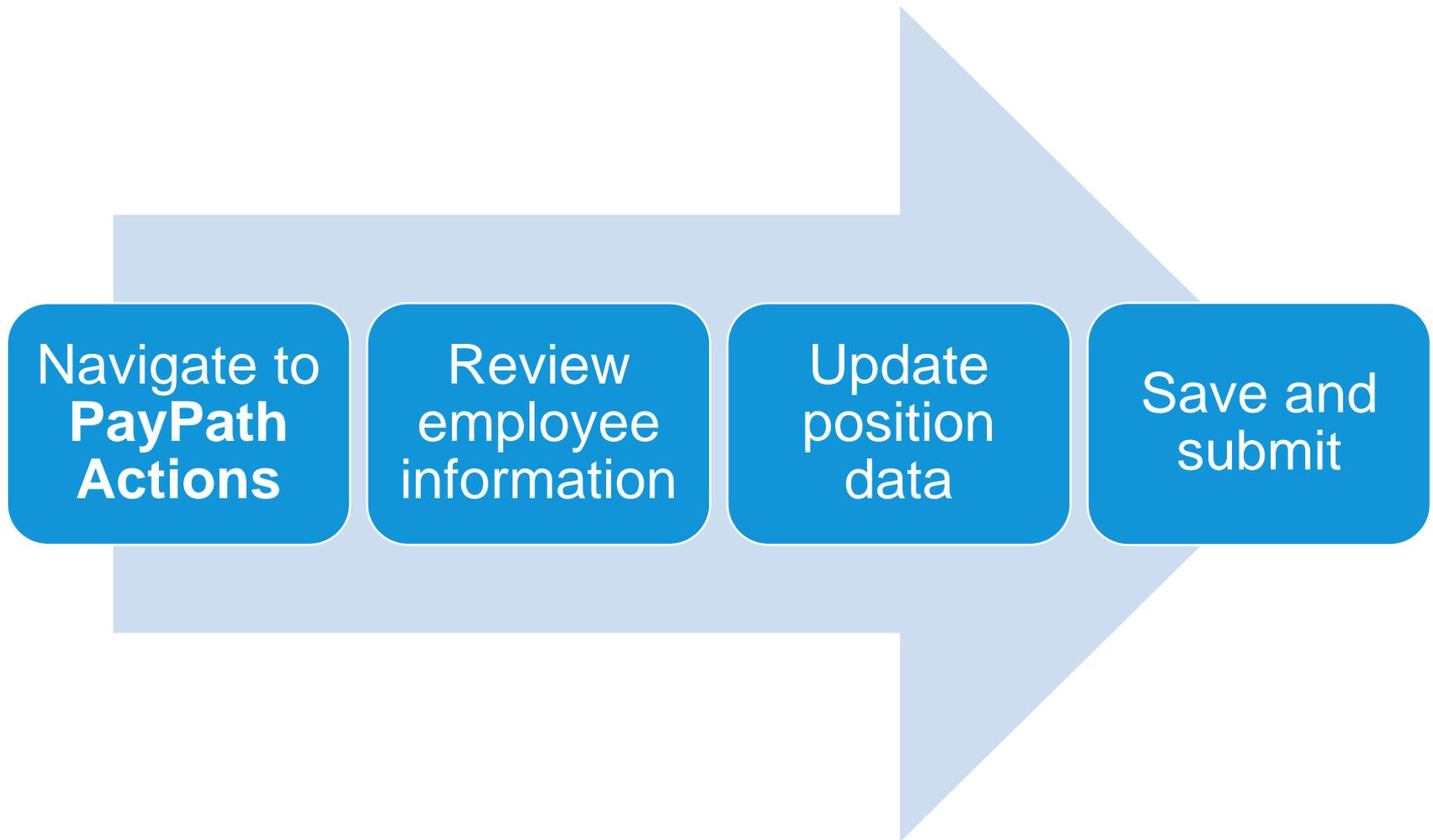
When a position data change is entered, a new row with the same effective date is automatically inserted in the **Job Data** page and displays the updated position information.

- ◆ All **Job Data** fields that are controlled by **Position Data** appear as display-only.
- ◆ If needed, you can add additional **Job Data** rows (with the same effective date) to enter job-related updates.

For example:

- ◆ **Position Data** change: Employee promoted to a new job code.
- ◆ **Job Data** change: Employee receives a pay rate increase.

Position Data Change – Key System Steps



Position Data Change – Action Reason Codes

- ◆ **Action** and **Action Reason** codes further define the purpose of position data change transactions.
- ◆ For position data changes, the **Action** is always the same, **POS**. You need to complete only the **Position Change Reason**.



PayPath Transactions – Action Codes, Reason Codes and Descriptions

- ◆ This is your opportunity to review the job aid.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.
- ◆ Ask your instructor for assistance.

Position Data Page

Position Data | Job Data | Additional Pay Data

Chen Allen Empl ID

Enter the **Effective Date** for the position update.

Enter the **Position Change Reason** for the position update.

[Position Data](#)

Position Number: 40000157 PROJECT POLICY ANL 4 GF Action: POS Position Change
 Effective Date: 07/31/2017 Position Change Reason:

New Values to update	Existing Values
Business Unit: UCOP1 UC Office of President	Current Effective Date: 10/17/2016
Department ID: 805600 UNDERGRADUATE ADMINISTRATION	UC Office of President
Location: FRANKLIN UCOP - Franklin Building	UC Office of President
Job Code: 005883 PROJECT POLICY ANL 4 GF	UC Office of President
Union Code: 99 Non-Represented	UC Office of President
FLSA Status: Exempt	UC Office of President
Reports To Position: 40000093	UC Office of President
Sal Admin Plan: CTOP	UC Office of President
Salary Grade: 23	UC Office of President
Standard Hours: 40.00	UC Office of President
FTE: 1.000000	UC Office of President
Mail Drop: 712348	UC Office of President
Position Pool:	UC Office of President
Employee Relations Code: All Others, Not Confidential	UC Office of President
Classified Indicator: Management & Sr Professional	UC Office of President

If the change requires a **Job Code** change, then the **Employee Relations Code** must be updated. Note the **Union Code** that is tied to the **Job Code**.

If a job code is tied to the **BX** union code, you must select **Stud Academic Title, HEERA** as the **Employee Relations Code**. If a job code is not tied to the **BX** union code, the **Employee Relations Code** must not be **Stud Academic Title, HEERA**.

Enter the appropriate update in the editable field(s).

Use the **Position Data** page to enter changes to position data.

You must enter the **Effective Date** and the **Position Change Reason** fields before entering the update.

- The **Effective Date** cannot be the same date as any existing effective date for the employee in the **Position Information** component. This is because there is no effective date sequencing for position information. Use the **Position Data** link to review employee position information including existing effective dates.

Position information updated on this page also updates the **Job Data** page.

Return to Search

Position Data | Job Data | Additional Pay Data



Initiate Position Data Change PayPath Transaction (Staff/Acad)

- ◆ Watch as your instructor demonstrates how to initiate a position data change PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Position Data Change PayPath Transaction (Staff/Acad)

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Position Data Change PayPath Transaction (Promotion)

- ◆ Watch as your instructor demonstrates how to initiate a position data change PayPath transaction for a promotion in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Acad Promotion)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff Promotion)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Position Data Change PayPath Transaction (Promotion)

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Acad Promotion)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff Promotion)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Position Data Change PayPath Transaction (FTE Change)

- ◆ Watch as your instructor demonstrates how to initiate a position data change PayPath transaction for an FTE change in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Acad FTE Change)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff FTE Change)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

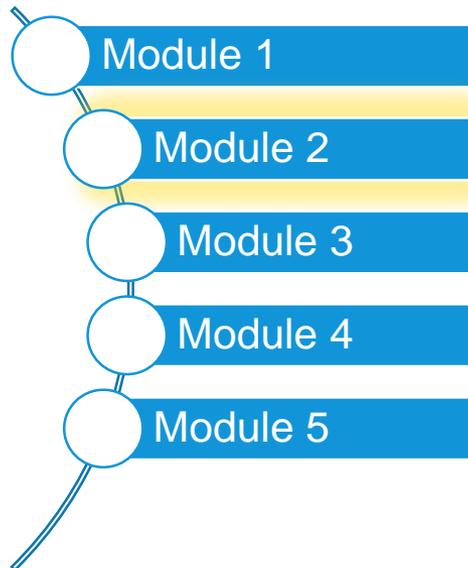
Exercise



Initiate Position Data Change PayPath Transaction (FTE Change)

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Acad FTE Change)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Position Data Change PayPath Transaction (Staff FTE Change)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Module Objectives Review



Having completed this module, you should be able to:

- ◆ Describe the key system steps to complete a position data change PayPath transaction.
- ◆ Initiate position data change PayPath transactions.

Module Review

Introduction

- ◆ You now have the opportunity to assess your knowledge of the information presented in this module.
- ◆ The questions and answers presented in this review help you to determine whether you remember and understand the important points.

True or False



Position data changes in **PayPath Actions** can be initiated for vacant positions (positions not filled).

False: Position data changes in **PayPath Actions** can be initiated only for filled positions where only one employee is assigned to the position.

Fill-In-The-Blank



Position information that is updated on the **Position Data** page also updates the position-related information on the **Job Data** page.

Multiple Choice



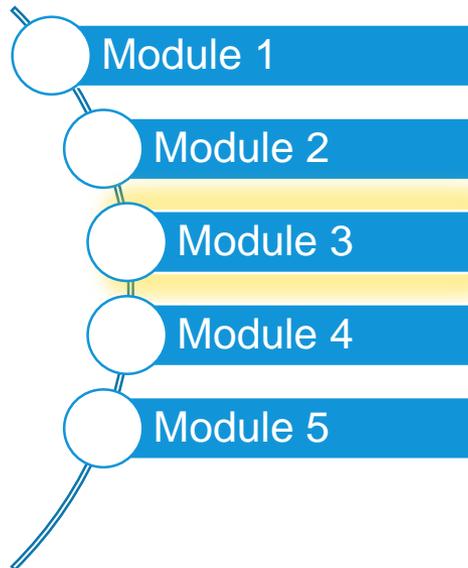
You must enter the following field(s) on every position data change transaction:

- A. Effective Date
- B. Position Action Reason
- C. Position Action
- D. All of the above
- E. A and B

Job Data Changes

Module 3

Module Objectives



The module learning objectives are:

- ◆ Describe the key system steps to complete a job data change PayPath transaction.
- ◆ Initiate a multi-row job data change PayPath transaction.
- ◆ Initiate a pay rate change PayPath transaction.
- ◆ Initiate job earnings distribution PayPath transactions.
- ◆ Initiate short work break PayPath transactions.

Job Data Changes – Overview

- ◆ The **Job Data** page is used for many types of job-related updates, which can be made independent of a position data change.
 - ◆ However, if a position data change is made, PayPath automatically updates the employee's **Job Data** page to display the new position information.
- ◆ Some of the **Job Data** fields and values display differently for academic employees than they do for staff employees.

Job Data Page – Staff Example

Position Data **Job Data** Additional Pay Data

Chen Allen Employee Empl ID 10000077 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: 07/31/2017 Action:
 Effective Sequence: 0 Action Reason:

Current Effective Date: 10/17/2016 Current Action: POS Position Change
 Current Eff Sequence: 0 Current Action Reason: RTC Reports To Change

Position Number: 40000157 PROJECT POLICY ANL 4 GF
 Business Unit: UCOP1 UC Office of President
 Department: 805600 UNDERGRADUATE ADMISSIONS
 Location Code: FRANKLIN UCOP - Franklin Building
 Job Code: 005883 PROJECT POLICY ANL 4 GF
 Union Code: 99 Non-Represented
 Reports To Position Number: 40000093 ADMISSIONS RECRMT MGR 3 10001557 Annette Gil
 FLSA Status: Exempt
 Salary Administration Plan: CTOP Establishment ID: UCOP UC Office of the President
 Step:
 Salary Grade: 23 Employee Class: 2 Staff: Career
 FTE: 1.000000
 Appointment End Date:

Earnings Distribution Type: None Comp Rate: 7,846.917500 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	94,163.010000	Annual

Earnings Distribution Personalize | Find | First 1 of 1 Last

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data Personalize | Find | First 1 of 1 Last

ERIT/Phased Retirement End Dt: Trial Employment End Date:
 Probation Code: None PY Career Duration:
 Location Use End Date: Probation End Date:
 Location Use Type:

Job Data Comments:

Position Data | Job Data | Additional Pay Data

This is an example of the staff version of the **Job Data** page. The staff and academic versions are very similar; however, each version includes some fields and data that is relevant to either academic or staff employees.

For example, for staff:

- The data values available in the **Action** and **Action Reason** fields are specific to staff.
- The **Employee Class** field can be edited.
- The fields in the **UC Job Data** section are specific to staff.

If the employment is a short-term assignment or temporary hire, the date the position ends appears in the **Appointment End Date** field.

- Non-Academic employees are automatically terminated in UCPATH on this date.

Locations monitor expected job/appointment end dates and, if needed, update/extend the **Appointment End Date** to ensure the termination does not occur.

Job Data Page – Academic Example

Position Data | **Job Data** | Additional Pay Data

Annabelle Bernard Employee Empl ID 10132507 Empl Record 0 [Funding Entry Page](#)
 Academic: Faculty HR Status: Active Payroll Status: Active [Work Force Job Summary](#)
[Person Org Summary](#)

Job Data Find | View All First 1 of 2 L

Effective Date: 06/12/2017 Action: Q
 Effective Sequence: 1 Action Reason: Q

Current Effective Date: 05/01/2017 Current Action: POS Position Change
 Current Eff Sequence: 1 Current Action Reason: COR Position Data Correction

Position Number: 40159897 HS ASST CLIN PROF-HCOMP
 Business Unit: LACMP UCLA Campus
 Department: 170000 Surgery-Chairman
 Location Code: 174918 Chs
 Job Code: 001731 HS CLIN INSTR-HCOMP
 Union Code: 99 Non-Represented
 Reports To Position Number: 40086506 PROF-HCOMP 10042582 Taylor Stewart
 FLSA Status: Exempt
 Salary Administration Plan: APUB Establishment ID: UCLA UC Los Angeles
 Salary Grade: 4 Step: 1
 FTE: 1.000000 Employee Class: 9 Academic: Faculty
 Appointment End Date: End Job Automatically:

Earnings Distribution Type: By Amount Comp Rate: 13,900.000000 Standard Hours: 40.00 Pay Frequency: M Monthly

Pay Components Personalize | Find | | First 1-3 of 3 Last

Rate Code	Comp Rate	Compensation Frequency
1 UCHSP	59,400.000000	Annual
2 UCHSX	59,400.000000	Annual
3 UCHSY	48,000.000000	Annual

Earnings Distribution Personalize | Find | | First 1-3 of 3 Last

Earnings Code	Comp Rate	Distribution %
1 HSN	4,000.000000	28.780
2 HSP	4,950.000000	35.610
3 HSR	4,950.000000	35.610

UC Job Data

Post Docs Anniversary Date: Academic Duration of Appt:

Location Use End Date: Location Use Type:

Job Data Comments: Promotion with step update. Added Y component of pay.

The academic version of the **Job Data** page is similar to the staff version, but there are some differences.

For example, for academics:

- The data values available in the **Action** and **Action Reason** fields are specific to academics.
- The **Employee Class** defaults and cannot be edited.
- The functionality of **Pay Components** and **Earnings Distribution** supports academic pay calculations.
- The fields in the **UC Job Data** section are specific to academics.

For Academic employees, the **End Job Automatically** check box also appears. This check box must be selected to automatically terminate the academic employee on the **Appointment End Date**.

Multiple Job Data Changes

Effective date sequencing is important when compensation is involved. When entering multiple rows of **Job Data** in a single transaction:

- ◆ All rows must be the same **Effective Date**.
 - ◆ The sequence number is automatically populated when you add a row in the **Job Data** tab.
- ◆ Enter the rows in sequential order or the order in which they occur.
 - ◆ **Seq. 0** is the first update, then add a row.
 - ◆ **Seq. 1** is the next update, then add a row.
 - ◆ **Seq. 2** is the next update, and so forth.

Action	Effective Date	Effective Seq.	Notes
Position Promotion	3/1/2016	0	Position Data change automatically inserts the first row in PayPath Job Data.
Pay Rate Change / Promotion	3/1/2016	1	Second row added by user.
Pay Rate Change / Equity	3/1/2016	2	Third row added by user.

Job Data Change – Action Reason Codes

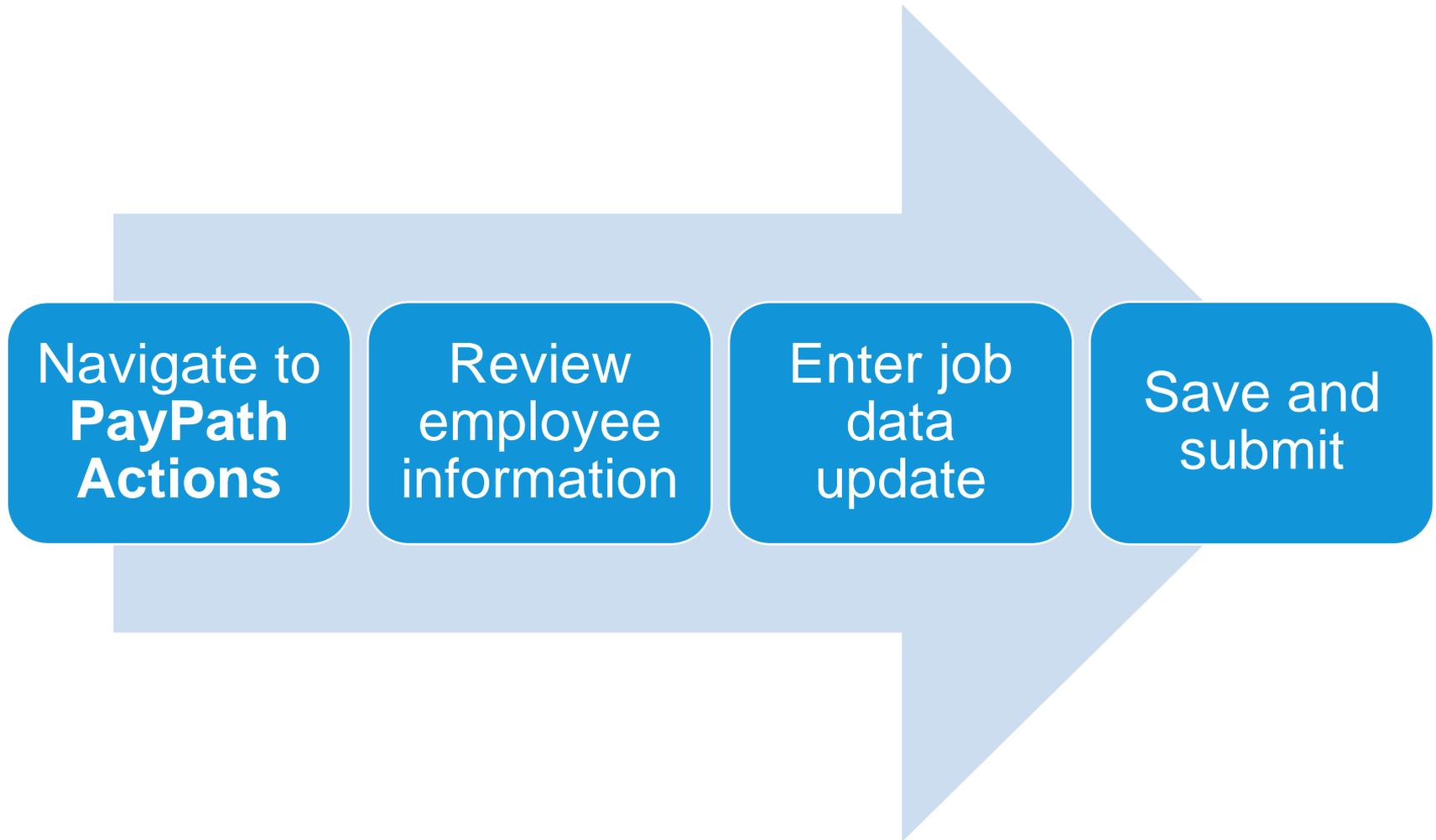
- ◆ **Action** and **Action Reason** codes further define the purpose of job data change transactions.
- ◆ The **Action** and the **Action Reason** fields are required.
- ◆ The values available in the **Action Reason** field are dependent on the selection made in the **Action** field.



PayPath Transactions – Action Codes, Reason Codes and Descriptions

- ◆ This is your opportunity to review the job aid.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.
- ◆ Ask your instructor for assistance.

Job Data Change – Key System Steps



Job Data Page – Data Entry

Position Data **Job Data**

Chen Allen 777 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: 07/31/2017

Effective Sequence: 0

Action:

Action Reason:

Current Effective Date: 10/17/2016 Current Action: POS Position Change
 Current Eff Sequence: 0 Current Action Reason: RTC Reports To Change

Position Number: 40000157 PROJECT POLICY ANL 4 GF
 Business Unit: UCOP1 UC Office of President
 Department: 805600 UNDERGRADUATE ADMISSIONS
 Location Code: FRANKLIN UCOP - Franklin Building
 Job Code: 005883 PROJECT POLICY ANL 4 GF
 Union Code: 99 Non-Represented
 Reports To Position Number: 40000093 ADMISSIONS RECRMT MGR 3 10001557 Annette Gil
 FLSA Status: Exempt
 Salary Administration Plan: CTOP Establishment ID: UC Office of the President
 Salary Grade: 23 Step:
 FTE: 1.000000 Employee Class: Staff: Career
 Appointment End Date:

Earnings Distribution Type: None Comp Rate: 7,846.917500 Standard Hours: 40.00 Pay Frequency: Monthly

Pay Components Personalize | Find | | First 1 of 1 Last

Rate Code	Comp Rate	Compensation Frequency
1 UCANNL <input type="text"/>	94,163.010000 <input type="text"/>	Annual <input type="text"/>

Earnings Distribution Personalize | Find | | First 1 of 1 Last

Earnings Code	Comp Rate	Distribution %
1		

UC Job Data

ERIT/Phased Retirement End Dt: Trial Employment End Date:

Probation Code: PY Career Duration:

Location Use End Date: Probation End Date:

Location Use Type:

Job Data Comments:

Position Data | Job Data | Additional Pay Data

Enter the **Effective Date** for the job data update.

Enter the **Action** and **Action Reason** for the job data update.

To review all job data rows for the employee (single employee assignment), click the **Work Force Job Summary** link. To review all current assignments (multiple employee assignments), click the **Person Org Summary** link.

Click **+** to add multiple job data changes in the same transaction. Multiple changes can be entered only for the same **Effective Date**.

Use the **Job Data** page to enter updates to job-related data such as pay, earnings distribution and short work break. You must enter the **Effective Date** and the **Action** and **Action Reason** fields before entering an update.

Use the PayPath **Job Data Comments** to record details about the position and/or job changes. This note is stored directly in the notes feature of the **Job Data** component for the employee.

Job Data – Change Types

There are many types of **Job Data** changes, most of which fall into the first three categories.

Data

Pay Rate

**Job
Earnings
Distribution
(JED)**

**Short Work
Break**

Change Type – Data

Examples of data changes requested through PayPath include:

- ◆ Extension of Appointment End Date
- ◆ Extension of Location Use End Date
- ◆ Update Post Doc Anniversary Date
- ◆ Academic Reappointment
- ◆ Change from Limited to Career Status and Change of Employee Class (Staff Only)
- ◆ Update to Probation Code and/or Probation Date



Data



Initiate Multi-Row Job Data Change PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate multiple job data changes in a single PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Multi-Row Job Data Change PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Change Type – Pay Change

Examples of pay changes requested through PayPath include:

- ◆ Change to rate of pay for staff or academic
 - ◆ Merit/Reappointment
 - ◆ Equity increases
 - ◆ Changes to negotiated salaries
 - ◆ Adjustments to off-scale salary amounts
 - ◆ Step increase progression

Pay Rate



Initiate Pay Rate Change PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a pay rate change PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Pay Rate Change PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.



Initiate Pay Rate Change PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Pay Rate Change PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Change Type – Job Earnings Distribution

The Job Earnings Distribution (JED) is primarily used to distribute earnings by earn codes either by percentage or by amount, and is important for exempt employees as it controls how much they are paid when an adjustment to their FTE is not applicable.

Non-Exempt employees' pay is generated based on their hours submitted in Time and Attendance.

Examples of JED changes requested through PayPath include:

- ◆ Employee Reduction in Time (ERIT)
- ◆ Phased Retirement Program
- ◆ HSCP- Health Sciences Compensation Plan
- ◆ NSTP- Negotiated Salary Trial Program

**Job
Earnings
Distribution
(JED)**



Initiate Job Earnings Distribution PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a job earnings distribution PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Staff)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.



Initiate Job Earnings Distribution PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Staff)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Return to Normal (JED) Distribution PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a return to normal (JED) distribution PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Return to Normal (JED) Distribution PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Return to Normal (JED) Distribution PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Return to Normal (JED) Distribution PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Change Type – Short Work Break

The UCPATH Short Work Break (SWB) process refers to placing an employee on, and returning them from, a short work break.

- ◆ The action of SWB can be used to stop pay for an employee in the system for a temporary period of time and moves them to a 'work break' status.
- ◆ This process applies to both staff and academic employees.
- ◆ Employee's on SWB are monitored at locations on a regular basis. The UCPATH Center is responsible for monitoring the Short Work Break Audit Report and works with Locations to confirm the appropriate course of action regarding the employee on SWB.

**Short Work
Break**

Short Work Break – Academic Examples

Type	Description
Academic Students	Used to put academic students off pay status over the summer or in between quarters/semesters.
Unit 18- Benefits Bridge Eligible	Used to put a Unit 18 employee off pay status in between quarters/semesters of active employment. The employee is eligible to request a Benefits Bridge.
Unit 18- Benefits Bridge Not Eligible	Used to put a Unit 18 employee off pay status in between quarters/semesters of active employment. The employee is not eligible to request a Benefits Bridge.
Variable Appointment	Used to put an exempt academic employee with a highly variable schedule off pay status in between periods of active employment.
Research Funding Bridge	Used to place an employee that is awaiting research funding on SWB.

Short Work Break – Staff Examples

Type	Description
Partial-Year Career Furlough	Used to place a partial-year career employee on furlough. Action Reason selection is based on the number of working months the partial-year career employee is scheduled to work: 9, 10 or 11 months.
Floater	Used for floater employees during periods of inactivity.
Limited Employees	Used for limited employees off pay status.
Undergraduate Students	Used to put undergraduate students (covered under PPSM) off pay status over the summer or in between quarters/semesters.



Short Work Break Matrix

- ◆ This is your opportunity to review the job aid.
- ◆ Open the **UCPath Help** site and refer to the *Short Work Break Matrix* topic.
- ◆ Ask your instructor for assistance.



Initiate Short Work Break PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a short work break PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Short Work Break PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Short Work Break PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Short Work Break PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Return from Short Work Break PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a return from short work break PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

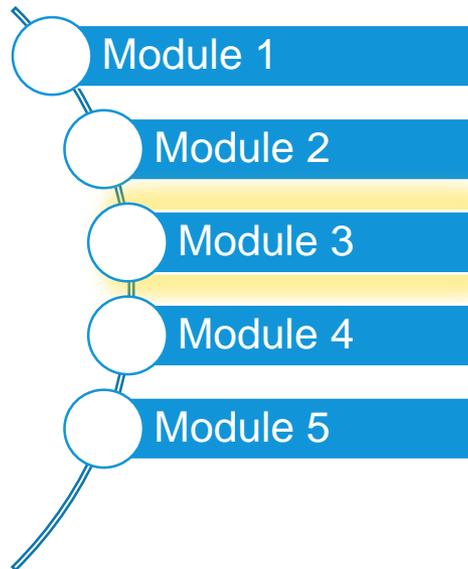
Exercise



Initiate Return from Short Work Break PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Module Objectives Review



Having completed this module, you should be able to:

- ◆ Describe the key system steps to complete a job data change PayPath transaction.
- ◆ Initiate a multi-row job data change PayPath transaction.
- ◆ Initiate a pay rate change PayPath transaction.
- ◆ Initiate job earnings distribution PayPath transactions.
- ◆ Initiate short work break PayPath transactions.

Module Review

Introduction

- ◆ You now have the opportunity to assess your knowledge of the information presented in this module.
- ◆ The questions and answers presented in this review help you to determine whether you remember and understand the important points.

True or False



For multiple **Job Data** updates, enter the rows of data in sequential order, or the order in which they should occur.

True.

Multiple Choice



Types of **Job Data** changes that can be initiated in **PayPath Actions** include:

- A. Job Data, Short Work Break, Leave of Absence
- B. Pay Rate, Job Data, Termination
- C. Job Data, Pay Rate, Job Earnings Distribution
- D. All of the above

Fill-In-The-Blank

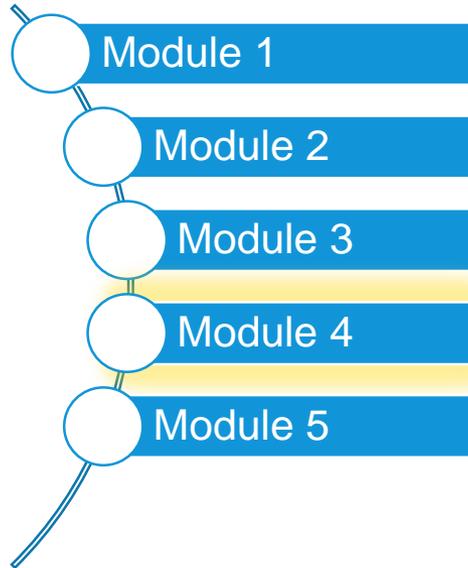


You must enter values in the **Effective Date**, **Action** and **Action Reason** fields before entering a **Job Data** update.

Additional Pay

Module 4

Module Objectives



The module learning objectives are:

- ◆ Describe the key systems steps to complete an additional pay PayPath transaction.
- ◆ Initiate additional pay PayPath transaction.
- ◆ Initiate update to additional pay PayPath transaction.
- ◆ Initiate retroactive additional pay PayPath transaction.

Additional Pay – Overview

- ◆ **Additional Pay** is any compensation above a University employee's regular, base compensation.
- ◆ **PayPath Additional Pay** can be used for recurring additional pay transactions where payments are paid over multiple, consecutive pay periods.
 - ◆ One-time payments should be entered using the **One-time Payments** page. One-time payments apply to a single pay cycle or non-consecutive pay cycles.
- ◆ Recurring additional pay transactions entered in PayPath are routed for approvals and then transferred to a Payroll staging table to be processed automatically by UCPC Payroll additional pay batch upload process.
- ◆ Some examples of **Additional Pay** include stipends, summer session teaching, certification pay, uniform allowances.

Additional Pay – New Hires

Additional pay for new hires:

- ◆ When an employee is hired and the Hire Template transaction has been submitted for approval, the employee is not available in PayPath until the Hire Template has been approved and processed by UCPC WFA Production.
- ◆ After the employee is available in PayPath, the employee's additional pay data cannot be updated until the Payroll nightly process has assigned the employee's pay group.

Additional Pay Files

- ◆ Additional pay files are processed during on-cycle payrolls only.
 - ◆ Refer to the **UCPath Production Processing Schedule** for deadlines.
 - ◆ When additional pay transactions are entered into UCPath, the AWE approval process must be completed before UCPath sends the files to payroll processing.
 - ◆ Allow sufficient time to get the transactions through the approval process so they can be processed in the next on-cycle.
 - ◆ Submitted transactions are attached to a specific run ID. If the approved transaction is past the due date, the request will be cancelled and must be resubmitted by the Location.
- ◆ Additional Pay transactions can be continuously submitted. The UCPath Center batches these transactions every morning so they are available to view in staging the next day.
 - ◆ This means that the Locations can see the status of a transaction one business day after submission, even if it is days or weeks before the specific payroll begins.

Additional Pay – Key System Steps

Navigate to
**PayPath
Actions**

Review
employee
information

Enter
additional
pay

Save and
submit

Additional Pay Data Page

Position Data | Job Data | **Additional Pay Data**

Chen Allen Employee Empl ID 1000077 Empl Record 0

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

*Earnings Code:

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 07/31/2017

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

Addl Seq #: 1

End Date: Reason:

Pay Period Amt:

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type:	Salaried	Standard Hours:	40.00
Compensation Rate:	\$7,846.917500	Frequency:	Monthly

Default Job Data

Position:	40000157	PROJECT POLICY ANL 4 GF	
Business Unit:	UCOP1	UC Office of President	
Department:	805600	UNDERGRADUATE ADMISSIONS	
Job Code:	005883	PROJECT POLICY ANL 4 GF	
FTE:	1.000000		
Employee Status:	Active	Expected Job End Date:	

Transaction ID: NEW
Workflow Status: Apprvl Prc
Request Status: In Progress

Initiator's Comments:

User ID:

Position Data | Job Data | Additional Pay Data

Use the PayPath Actions **Additional Pay Data** page to enter specific information about the recurring payment.

Enter the **Earnings Code**, **Effective Date** and **Pay Period Amount**. You can also enter a **Goal Amount** or **End Date**.

If the employee has existing additional pay, it displays in the **Current Additional Pay** section. In this example, the employee does not have existing additional pay set up.

The options available are based on the employee's pay cycle (for example, monthly or biweekly). For biweekly employees, you may select in which pay periods the amount should be paid.

This section displays a summary of the employee's current job data.

Enter comments you want the approver to see during the review of this request.

Current Additional Pay

Position Data | Job Data | **Additional Pay Data**

Richard Smith Employee Empl ID 10014497 Empl Record 0

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

*Earnings Code:

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 08/03/2017

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

Addl Seq #: 1

End Date: Reason: Not Specified

Pay Period Amt:

Goal Amount:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Current Additional Pay

Earnings Code: CRT Certification Pay

Effective Date: 01/29/2017

▼ **Payment Details**

Addl Seq #: 1

End Date: 07/31/2017 Reason: N

Pay Period Amt: \$55.39

Goal Amount: Goal Balance:

OK to Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Hourly Standard Hours: 24.00

Compensation Rate: \$56.340000 Frequency: Hourly

Default Job Data

Position: 40020862 CLIN NURSE 2

Business Unit: LAMED UCLA Medical Center

Department: 282300 Medctr-Emergency Medicine Cent

Job Code: 009139 CLIN NURSE 2

FTE: 0.600000

Employee Status: Active Expected Job End Date:

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

User ID UC_SHERMAN

In this example, the employee has existing additional pay, which displays in the **Current Additional Pay** section.

The **Click here to view pending E330 additional pay transactions** link appears in the header if an approved PayPath additional pay transaction is sitting in the staging table, pending to be processed into UCPATH. The link is not shown in this example.

Click the link to review the pending additional pay transaction prior to entering a new additional pay transaction to prevent duplicate entries and possible overpayment.



Initiate Additional Pay PayPath Transaction (Staff/Acad)

- ◆ Watch as your instructor demonstrates how to initiate an additional pay PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Additional Pay PayPath Transaction (Staff/Acad)

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Update Additional Pay

Updates can be made to existing recurring additional pay transactions.

The update must be for the same **Earnings Code**.

The update must have an **Effective Date** that is within the existing recurring pay **Effective Date** (start date) and **End Date**.

Position Data | **Job Data** | **Additional Pay Data**

Daniel Allen Employee

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: 02/01/2017

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1 Override Data

End Date: 02/28/2017 Reason: Not Specified

Pay Period Amt: \$1,991.18

Goal Amount: Goal Balance:

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Empl Record 0

Current Additional Pay Find | View All First 1 of 1 Last

Earnings Code: SAS Stipend-Admin-Staff

Effective Date Find | View All First 1 of 2 Last

Effective Date: 01/01/2017

Payment Details Find | View All First 1 of 1 Last

Addl Seq # 1

End Date: 02/28/2017 Reason: Not Specified

Pay Period Amt: \$1,991.18

Goal Amount: Goal Balance:

OK to Pay

Applies To Pay Periods

First Second Third

After you enter the **Earnings Code** and the new **Effective Date**, the current recurring information populates and the **Override Data** button appears. Click the **Override Data** button to open the recurring information fields for edit.



Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)

- ◆ Watch as your instructor demonstrates how to update an existing recurring additional pay PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Update to Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Retroactive Additional Pay

Position Data | Job Data | **Additional Pay Data**

Chen Allen Employee Empl ID 10000077 Empl Record 0

No Data present for current Additional Pay

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

*Earnings Code: []

Effective Date Find | View All First 1 of 1 Last

*Effective Date: 07/31/2017

Payment Details Find | View All First 1 of 1 Last

Addl Seq #: 1

End Date: [] Reason: Not Specified

Pay Period Amt: []

Goal Amount: [] Goal Balance: []

Prorate Additional Pay

Applies To Pay Periods

First Second Third

Job Information

Employee Type: Salaried Standard Hours: 40.00

Compensation Rate: \$7,846.917500 Frequency: Monthly

Default Job Data

Position: 40000157 PROJECT POLICY ANL 4 GF

Business Unit: UCOP1 UC Office of President

Department: 805600 UNDERGRADUATE ADMISSIONS

Job Code: 005883 PROJECT POLICY ANL 4 GF

FTE: 1.000000

Employee Status: Active Expected Job End Date: []

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 []

User ID []

Return to Search

Position Data | Job Data | **Additional Pay Data**

- ◆ Retroactive dating is available for additional pay.
- ◆ The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the **Effective Date**.
- ◆ In the **Effective Date** field, enter the previous pay period date that the additional pay should have started.



Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

- ◆ Watch as your instructor demonstrates how to initiate a retroactive additional pay PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

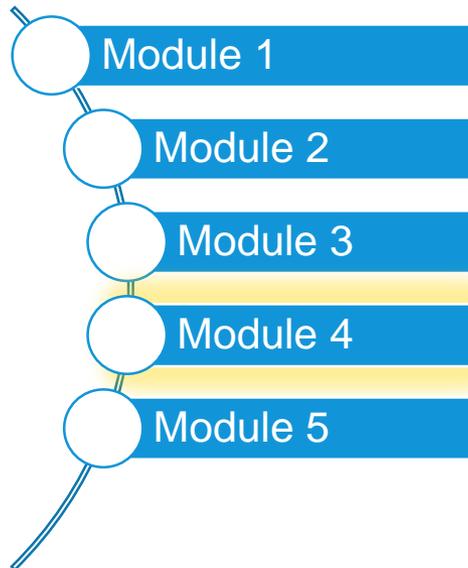
Exercise



Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Retroactive Additional Pay PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Module Objectives Review



Having completed this module, you should be able to:

- ◆ Describe the key systems steps to complete an additional pay PayPath transaction.
- ◆ Initiate additional pay PayPath transaction.
- ◆ Initiate update to additional pay PayPath transaction.
- ◆ Initiate retroactive additional pay PayPath transaction.

Module Review

Introduction

- ◆ You now have the opportunity to assess your knowledge of the information presented in this module.
- ◆ The questions and answers presented in this review help you to determine whether you remember and understand the important points.

Fill-In-The-Blank



Additional pay files are processed during on-cycle payrolls only.

True or False



Updates can be made to existing recurring additional pay transactions.

True.

Multiple Choice



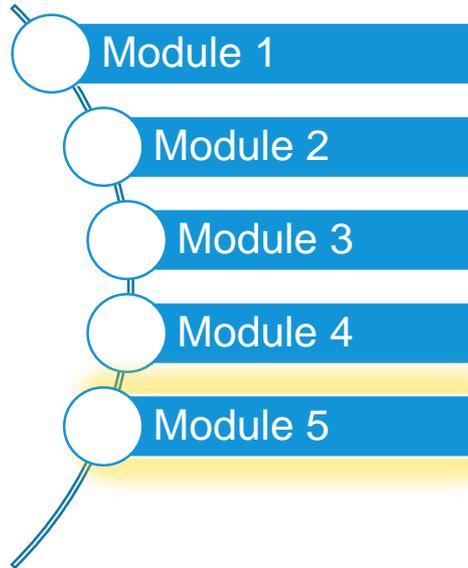
The steps for entering a retroactive additional pay transaction are similar to any other additional pay, with the exception of the _____.

- A. Pay Period Amount
- B. Effective Date
- C. End Date
- D. All of the above
- E. A and C

Combination Changes

Module 5

Module Objectives

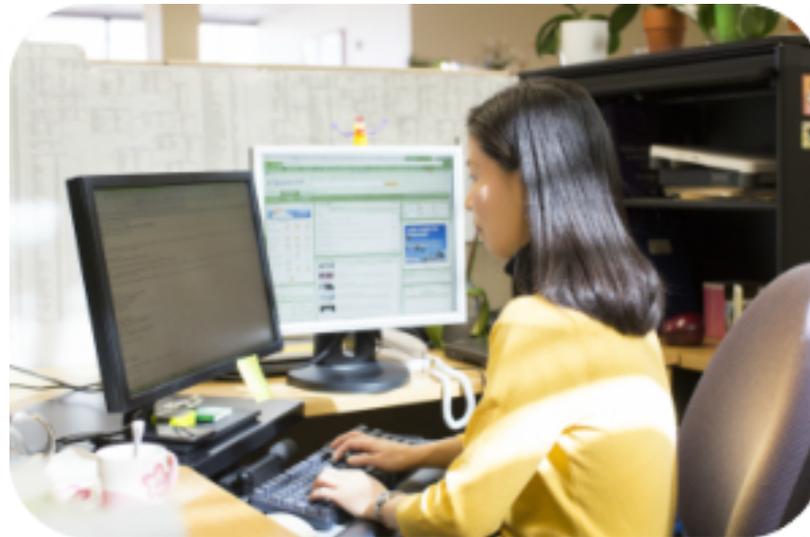


The module learning objectives is:

- ◆ Initiate various PayPath combination transactions.

Combination Changes – Overview

- ◆ There are many circumstances where a combination of changes are needed between position data, job data and additional pay.
- ◆ The following slides provide direction for additional practice on some of the common combination changes.



Things to Remember ...

- ◆ **Position Data** and **Job Data** changes can be entered in a single PayPath transaction; however, they must have the same **Effective Date**.
 - ◆ You can enter multiple **Additional Pay** entries with different **Effective Dates** in a single PayPath transaction.
- ◆ When a position data change is entered, a new row is automatically inserted in the **Job Data** page and displays the updated position data fields.
- ◆ All **Job Data** fields that are controlled by **Position Data** appear as display-only.
- ◆ After a PayPath transaction is submitted for approval (Pending Approval status), you cannot enter another PayPath transaction for that employee record until the pending transaction has been processed by all Approvers.



Initiate Position Data + Job Data Change PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad)* topic.
 - ◆ **Academic Health Sciences Compensation Plan (HSCP):** Open the **UCPATH Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad HSCP)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Position Data + Job Data Change PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad)* topic.
 - ◆ **Academic (HSCP):** Open the **UCPath Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Acad HSCP)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Position Data + Job Data Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Job Data Change + Additional Pay PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Job Data Change + Additional Pay PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Job Data Change + Additional Pay PayPath Transaction (Staff)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction

- ◆ Watch as your instructor demonstrates how to initiate a combination change PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ **Academic:** Open the **UCPATH Help** site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPATH Help** site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.

Exercise



Initiate Position Data + Job Data + Additional Pay PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
 - ◆ **Academic:** Open the **UCPath Help** site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Acad)* topic.
 - ◆ **Staff:** Open the **UCPath Help** site and refer to the *Initiate Position Data + Job Data + Additional Pay Change PayPath Transaction (Staff)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.



Initiate Job Data FTE Override PayPath Transaction

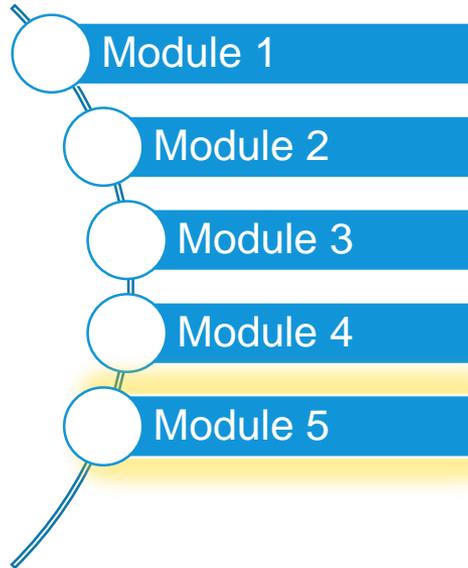
- ◆ Watch as your instructor demonstrates how to initiate a job data FTE override PayPath transaction in UCPATH.
- ◆ Follow along using the **UCPATH Help** topic.
 - ◆ Open the **UCPATH Help** site and refer to the *Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Print It** version of the topic.
- ◆ At the end of the demonstration, you will have the opportunity to practice this task.



Initiate Job Data FTE Override PayPath Transaction

- ◆ This is your opportunity to practice this task on your own.
- ◆ Open the **UCPath Help** site and refer to the *Initiate Job Data FTE Override PayPath Transaction (Staff/Acad)* topic.
- ◆ Launch the **Try It** version of the topic.
- ◆ Ask your instructor for assistance.

Module Objectives Review

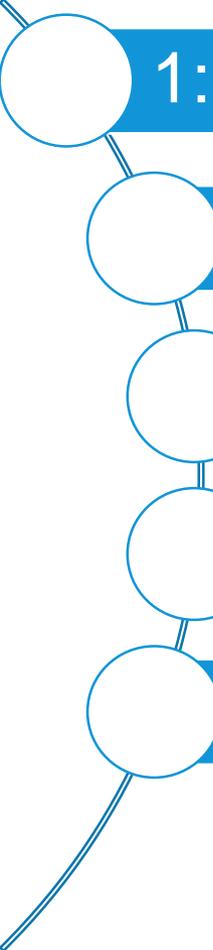


Having completed this module, you should be able to:

- ◆ Initiate various PayPath combination transactions.

Course Review

Course Agenda

- 
- 1: PayPath Transactions Overview
 - 2: Position Data Changes
 - 3: Job Data Changes
 - 4: Additional Pay
 - 5: Combination Changes

Putting It All Together



- ◆ As the Location PayPath Initiator, you initiate position data change, job data change and/or additional pay transactions, which are workflowed to Location PayPath Approver(s) for approval.
- ◆ **PayPath Actions** allows historic, current or future updates in **Position Data** and **Job Data**.
- ◆ The position data change **Effective Date** cannot be the same date as any existing effective date for the employee in the **Position Information** component because there is no sequence field for same-date actions.
- ◆ **Job Data** changes can be made independent of a position data change. However, if a position data change is made, PayPath automatically updates the **Job Data** page to display the new position information.
- ◆ Refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions* job aid for a description of all **Action** and **Action Reason** code combinations.

UCPath Production Processing Schedule

- ◆ The **UCPath Production Processing Schedule** identifies the key activities and deadlines for processing payroll for each pay group and pay cycle.
- ◆ The schedule is standard across all UC locations using UCPath. It ensures all files are submitted by the specified deadlines so that payroll is processed on time.
- ◆ In UCPath online navigate to **Quicklinks > Payroll Calendars & Schedules > Payroll Processing Schedule (YYYY)**.

Course Objectives Review



Having completed this course, you should be able to:

- ◆ Describe the PayPath Transaction system process.
- ◆ Describe the **PayPath Actions** entry pages.
- ◆ Describe the PayPath transaction action and reason codes.
- ◆ Initiate position data change PayPath transactions.
- ◆ Initiate job data change PayPath transactions.
- ◆ Initiate additional pay PayPath transactions.
- ◆ Initiate various PayPath combination transactions.

Parking Lot



- ◆ Review parking lot
 - ◆ Have all questions been answered during our class?
 - ◆ Are there any new questions to add to the list?

Where to Get Help



- ◆ The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
 - ◆ From the UCPath homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers.
 - ◆ From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.

