

STEP-BY-STEP INSTRUCTIONS FOR SUMMER COMPENSATION

Creation Date: 03/22/19

In UCPath, several methods will be used to pay summer salary – which includes summer research, summer administrative service, and Summer Session teaching – for academic appointees. This document describes the different methods and provides departments with criteria to decide how to transact summer salary actions in UCPath.

For this process to be successful:

- The Academic Appointee must secure summer employment for teaching, research, or service
- The Academic Appointee must communicate details of their summer employment to their AP Partner/AP Staff member prior to the month of service
- The AP Partner/AP Staff member must determine how to transact summer salary in UCPath, and consult with UCR's Academic Personnel Office (APO) for necessary guidance or approvals
- The Central Academic Personnel Office processes summer salary for all Faculty Administrator jobs only (all requests for Faculty Administrators summer salary transactions must be sent to Central APO)
- The Shared Service Centers (SSC) must process summer salary transactions for non-Faculty Administrator jobs quickly and accurately

There are three different ways to enter Summer Salary:

- 1. Add as additional compensation on an existing job
- 2. Add as base compensation on a new or concurrent job
- 3. Add as additional compensation on a new or concurrent job if an MOU requires a specific title for the summer teaching appointment or it is the only job

APO: ct Page 1 of 11



1. Additional Compensation for AY employees, when payroll certification is not required

Summer compensation should be established on the job where the additional compensation applies and paid via the PayPath module or as Additional Pay in the Self Service Transactions links module under the following conditions:

- On the primary professorial job when payroll certification is not required
- On the primary professorial job for Summer Session teaching
- Administrative ninths on the administrative job (i.e. department Chair receives a summer 1/9 for service) using Earn Code **DIF**

UCR Best Practice: Additional Compensation, when payroll certification <u>is not</u> required, should be paid as recurring Additional Pay in order for it to remain on the job for historical purposes, even if it is only for one month.

Step-by-Step Guidelines and Notes:

- The modules for Summer Compensation entry on Job can be accessed either through PayPath Actions or Self Service Transaction Links
- Summer Compensation can be entered in multiple transactions, one or more months at a time, as recurring Additional Pay
- Summer Compensation can also be entered in a single transaction by selecting "+" on Effective Date when using the same Earnings Code and/or selecting "+" on Earnings Code (Alternate Method)
 - o WARNING: the entire transaction will be denied, if there is an issue with ANY part of the request
 - BEST Practice: enter summer compensation one month per transaction (July and August can be made in a single transaction if there are no changes to amount or Earn Code)

	<u> </u>	<u>, </u>
Steps	PayPath Actions	Self Service Transaction Links
1.	Enter EE's ID or name	Additional Pay
2.	Select appropriate job	Enter EE's ID or name
3.	Additional Pay Data tab	Select appropriate job
4.	Select Earnings Code:	Select Earnings Code:
	- ACA (admin)	- ACA (admin)
	- ACR (research)	- ACR (research)
	- ACS (Summer-403) – used by	- ACS (Summer-403) – used by
	Professorial or other primary job code	Professorial or other primary job code
	- ASN (Summer-No 403) – used by	- ASN (Summer-No 403) – used by
	Lecturer, Associate_In, TA and Visiting	Lecturer, Associate_In, TA and Visiting
	Professor series	Professor series
	- DIF (admin) – used for part-time admin	- DIF (admin) – used for part-time
	appts. and dept. chair appts.	admin appts. and dept. chair appts.
5.	Effective Date (always 1 st of month)	Effective Date (always 1st of month)
	- If July and August will be 100%, this	- If July and August will be 100%, this
	can be entered in single line (07/01/19	can be entered in single line (07/01/19
	- 08/31/19)	- 08/31/19)
6.	End Date (always last day of the month)	End Date (always last day of the month)
7.	Reason: New Additional Pay	Reason: New Additional Pay

APO: ct Page 2 of 11



New Additional Pay

Creation Date: 03/22/19

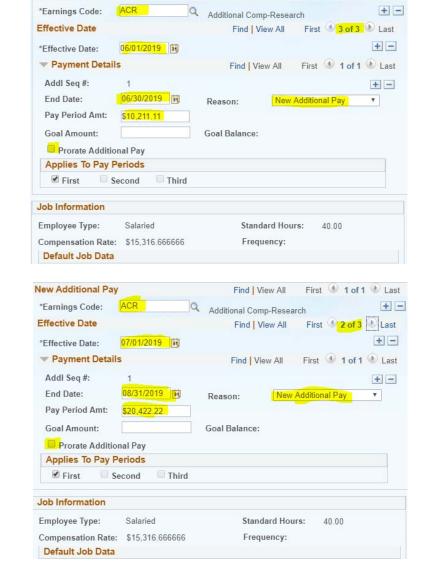
8.	Pay Period Amount: requested amount	Pay Period Amount: requested amount
9.	Goal Amount: LEAVE BLANK	Goal Amount: LEAVE BLANK
10.	Uncheck "Prorate Additional Pay"	Uncheck "Prorate Additional Pay"
11.	Applies to Pay Periods = First for monthly paid EE's	Applies to Pay Periods = First for monthly paid EE's
12.	Comments: i.e. \$XX,XXX Summer Salary for <month(s)></month(s)>	Comments: i.e. \$XX,XXX Summer Salary for <month(s)></month(s)>
13.	Submit	Submit

The screenshots below are set up for Research Summer Compensation entered in a single transaction for four months (June – September) (Alternate Method):

- Annual salary = \$183,800; 1/12 rate = \$15,316.67; 1/9 rate = \$20,422.22; 0.5/9 = \$10,211.11 (June & Sept)

Find | View All

First 1 of 1 Last



APO: ct Page **3** of **11**





Screenshot of 1/9 Administrative Summer Compensation for a Department Chair:



APO: ct Page 4 of 11



2. Additional Compensation for AY employees, when payroll certification is required

Summer compensation should be established on an additional job under the following conditions:

- When payroll certification is required
- The Summer appointment is the only job and wages must be reported for ACA purposes

Step-by-Step Guidelines and Notes:

- 1. Process a concurrent academic hire into the appropriate position
 - a. Use AY-1/9 Researcher job code when payroll certification is required
 - b. The <u>Position</u> should be established with an FTE of 1.0 and have the "Include FTE" box **unchecked**. This will allow the FTE on the job to be adjusted.

Primary Job Title	Professorial Job Code	Corresponding Researcher Job Code
Professor – AY	001100	003205
Associate Professor – AY	001200	003215
Assistant Professor – AY	001300	003225
Professor – AY – B/E/E	001143	001982
Associate Professor – AY – B/E/E	001243	001984
Assistant Professor – AY – B/E/E	001343	001986

- 2. Effective date should be the first month in which summer salary is requested (06/01/19, 07/01/19, 08/01/19 or 09/01/19)
- 3. On the Job Data tab, enter the position number; most of the fields will be automatically populated
- 4. FTE should correspond to the FTE requested for the first month of summer salary (for 2019, June has a max of 0.5263; July and August have a max of 1.0; and September has a max of 0.7368)
 - a. If FTE does not correspond, it will need to be adjusted in PayPath after the concurrent hire is approved
 - a. Maximum FTE per position is 1.0; if July and August will exceed 1.0, an additional concurrent hire into another Researcher position will be required for the additional percentage
- 5. Academic Duration of Appt = End Date (Academic Term Appts)
- 6. Enter the correct step to generate the UCANNL
- 7. Add the UCOFF1 to match the professorial salary, if applicable
 - a. If participating in NSTP, be sure to add the UCGCYN rate as well
- 8. Compensation Frequency = UC 9M
- 9. Expected Job End date should be the end of the last month of summer salary (06/30/19, 07/31/19, 08/31/19 or 09/30/19)
- 10. Check "End Job Automatically" box
 - a. If this is not done, you will need to go back and end the job at the end of summer employment else the employee will continue to be paid on this job until it has been terminated
- 11. On the Earnings Dist tab, Enter Job Earnings Distribution
 - a. without NSTP:
 - i. Earnings Distribution Type = By Percent
 - ii. Aggregate Comp Rate is automatically populated based on FTE

iii. Earnings Code = ACR

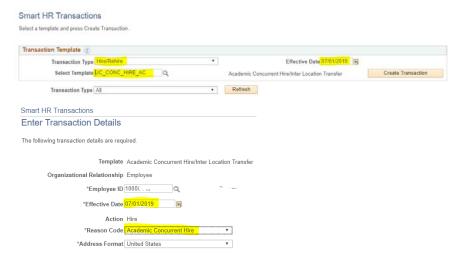
APO: ct Page 5 of 11



- iv. Percent of Distribution = 100
- b. With NSTP:
 - i. Earnings Distribution Type = By Percent
 - ii. Aggregate Comp Rate is automatically populated based on FTE
 - iii. Earnings Code = ACR
 - iv. Percent of Distribution = 100
- 12. Click on Addl Pay tab
 - a. Enter Initiator Comments
 - b. Click Save and Submit

Screenshots of Summer Compensation on Additional Job:

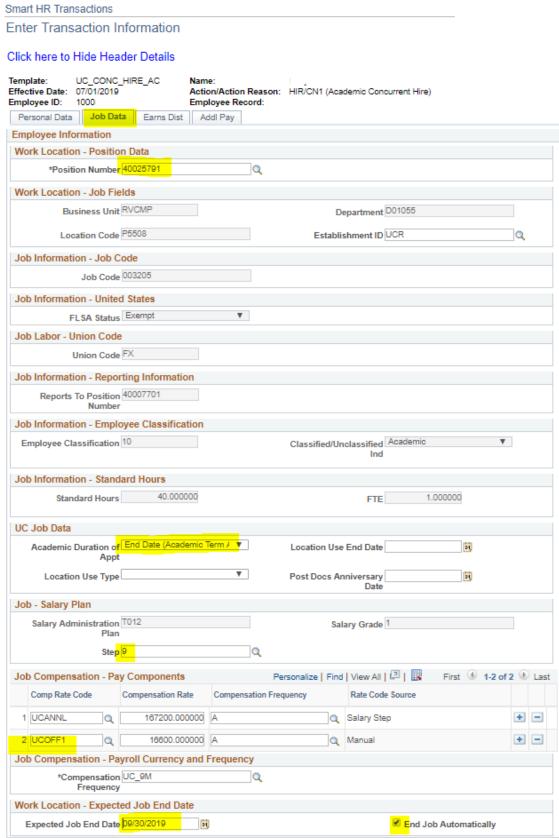
- Processing a concurrent hire for a request for summer salary from July 1 – September 30:



- Adding Position Number for the concurrent job and filling in or updating open fields, no NSTP component:

APO: ct Page 6 of 11

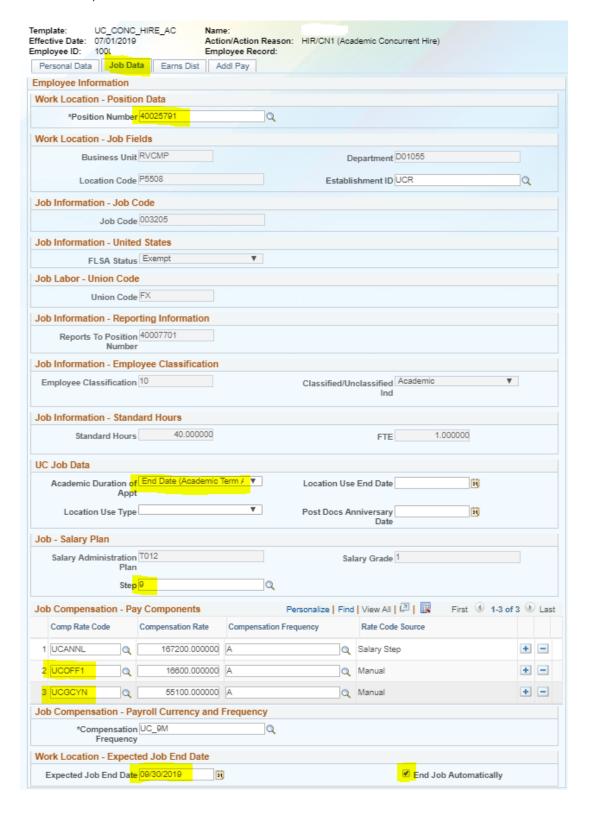




Return to Enter Transaction Details Page



- Adding Position Number for the concurrent job and filling in or updating open fields, <u>including</u> NSTP component:



APO: ct Page 8 of 11



Updating Job Earnings Distribution (JED) on Earnings Distribution tab:

Save for Later

Return to Enter Transaction Details Page

Save and Submit

Percent of Distribution must always equal 100%, even for partial ninths.

Smart HR Transactions **Enter Transaction Information** Click here to Hide Header Details UC_CONC_HIRE_AC Template: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire) Effective Date: Employee ID: 100C **Employee Record:** Personal Data Job Data Earns Dist Addl Pay **Employee Information** Job Earnings Distribution Type 20422.220000 Earnings Distribution By Percent Aggregate Comp Rate Job Earnings Distribution Personalize | Find | View All | 💷 | 🏢 First 1 of 1 Last **Earnings Code** Compensation Rate Percent of Distribution 1 ACR + Q 100.000000

To submit the transaction, click Addl Pay tab, add comments then click "Save and Submit": Smart HR Transactions **Enter Transaction Information** Click here to Hide Header Details UC_CONC_HIRE_AC Template: Effective Date: 07/01/2019 Action/Action Reason: HIR/CN1 (Academic Concurrent Hire) Employee ID: 1000 **Employee Record:** Addl Pay Personal Data | Job Data | Earns Dist **Employee Information** Personalize | Find | View All | 💷 | 🔣 **Additional Pay** First 1 of 1 Last **Effective Date Earnings Code** Reason for Additional Pay **Earnings End Date** Add'l Pay Amount Hou Not Specified ₩... 31 0

Cancel

Supporting documents

Return to Enter Transaction Details Page Save and Submit Save for Later Cancel Supporting documents Transaction ID: NEW 1/9 Summer Salary for July and **Initiator Comments:** August

APO: ct Page 9 of 11





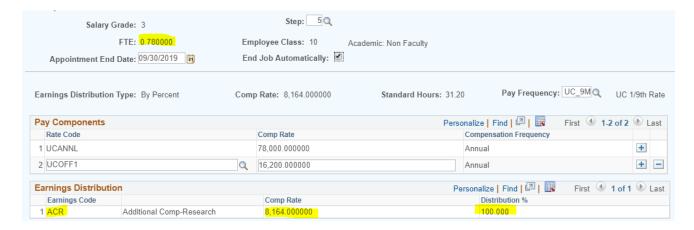
If the employee will not be receiving the same percentage as the first month or is requesting additional months beyond the end date, you will need to make the change for the other months in PayPath:

- 1. Enter either the EE's name or ID
- 2. Be sure to select the correct job Researcher 1/9
- 3. To extend the end date, if applicable, on the Job Data Tab
 - a. Enter the effective date
 - b. Action = DTA (Data Change)
 - c. Action Reason = EXT (Add/Extend Appointment)
 - d. Update Appointment End Date
 - e. Be sure "End Job Automatically" box is checked
 - f. Enter Job Data Comments (copy the comments to enter later)
- 4. On the Additional Pay Data tab
 - a. Paste comments from previous screen in the Initiator's Comments box
 - b. Click Save and Submit

Once this has been approved by AWE, you can make the other necessary changes

- 5. Enter either the EE's name or ID
- 6. Be sure to select the correct job Researcher 1/9
- 7. On the Position Data tab
 - a. Enter the effective date (07/01/19, 08/01/19 or 09/01/19)
 - b. Position Change Reason = TIT (Temporary Increase in Time) OR TRT (Temporary Reduction in Time)
 - c. Update FTE to correspond with the summer compensation requested
- 8. On the Job Data tab
 - a. The effective date flows through from the change on Position
 - b. The Comp Rate in the Earnings Distribution should now reflect the new rate which is still assigned to ACR with 100% distribution
 - c. Enter Job Data Comments: i.e. 100% Summer Salary for July and August (copy the comments to enter later)
- 9. On the Additional Pay tab,
 - a. Paste the comments from the previous screen in the Initiator's Comments box
 - b. Click Save and Submit

Screenshot of Job Data tab before increase to FTE:



APO: ct Page **10** of **11**



STEP-BY-STEP INSTRUCTIONS FOR SUMMER COMPENSATION

Creation Date: 03/22/19

Screenshot of Job Data tab after increase to FTE:



3. Additional Compensation on a New or Concurrent Job

Summer compensation should be paid as additional compensation on a new or concurrent job under the following conditions:

- If an MOU requires a specific title for the summer teaching appointment
- It is the employee's only job not subject to ACA reporting

Step-by-Step Guidelines and Notes:

- Process a concurrent academic hire into the appropriate position under job codes 001550 (Lecturer), 001501 (Associate_In), 002310 (Teaching Assistant), or the appropriate level of the Visiting Professor series job codes
- 2. No base compensation should be established on the new or concurrent job; do not use UCWOS
- Recurring additional compensation can be established at the time of onboarding <u>OR</u> through a
 subsequent Additional Compensation transaction once the onboarding transaction has been finalized
 by UCPC
 - Even if the employee will be paid for only one month, enter it as recurring additional pay (that is paid out one time)
- 4. Follow the same instructions as listed on page 1 of this document

APO: ct Page **11** of **11**